DIIMS End User Guide

Revised November 27^{th,} 2014

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Module 1 Overview of the DIIMS Enterprise Workspace

OBJECTIVES

DIIMS is an electronic content management system that stores and manages corporate information. It enables the lifecycle management of corporate information from the creation to archiving or destruction.

Information stored within the DIIMS repository enables GNWT business users to access, share, search, and collaborate on corporate information, and thereby improving and facilitating employees to accomplish their work goals.

Access to information is predetermined based upon the corporate security model applied at the corporate file structure. However, authors may assign access to their folders and documents on an individual and group basis.

This module is an overview of the Enterprise Workspace for the DIIMS electronic Content Lifecycle Management system.

In this module, you will learn to:

- Launch DIIMS
- Navigate the Enterprise Workspace
- Access information in the DIIMS repository
- View the two types of workspaces
- Identify DIIMS items
- Access documents
- Understand the Properties page.

1. Introduction

What is *DIIMS?*

DIIMS (Digital Integrated Information Management System) is a corporate GNWT-wide solution that enables the GNWT to gain better access and control of its electronic information throughout the organization.

Document management is the first step in gaining better control of the GNWT's electronic information. It will provide a means to timelier access to information and more efficient use of time and resources.

The increasing use of electronic information throughout the GNWT is placing increased burdens on resources (personnel and hardware). Space requirements to store multiple copies of the same document compound over time resulting in escalating storage costs.

Timely and efficient access to information is paramount, especially when it comes to legal "discovery" processes and ATIPP requests. Inability to find and produce documents can be costly and embarrassing for the GNWT while lost time searching for electronic information is increasingly problematic for employees.

2. An Overview of DIIMS within the GNWT

DIIMS is a content lifecycle management system that provides organizations with the tools to manage and share corporate information through its lifecycle from a single repository.

The DIIMS central repository offers:

- a secure, single repository for organizing and sharing enterprise content;
- imaging tools to convert physical records into digital records;
- indexing and classification of scanned content that is searchable;
- full lifecycle management of all electronic and physical content, enabling control retention and destruction according to organizational requirements;
- easy searching and retrieval capability, and the sharing of information through the application of permissions at the document level;
- Business-driven storage management according to business context and metadata, reducing costly storage services.

The DIIMS repository may be accessed from 3 interfaces:

1	Internet Explorer (WEB)	A web content based interface that provides users the ability to manage corporate information, records and web content contained in DIIMS.
2	(DIIMS) Enterprise Connect Windows Explorer Extension	A network-directory interface that offers business users the ability to access and manage documents through their corporate network folder structure and from the DIIMS repository.
3	(DIIMS) Enterprise Connect MS Outlook Extension	The MS Outlook interface provides the familiar email interface to access and manage information through DIIMS.

3. Launching and Logging into Web Interface–Internet Explorer

Launching the web interface is the same as launching a Web page: simply launch Internet Explorer (IE) from your desktop and enter the URL to the GNWT DIIMS site.

To launch the GNWT DIIMS website for the first time:

1. Click the IE icon on your desktop. *It automatically launches the DIIMS website:*

   http://diims.pws.gov.nt.ca

   (DIIMS uses your desktop credentials; your username in DIIMS will appear as "\loginname")

   The GNWT DIIMS Enterprise Workspace appears.

Figure 1-1: GNWT DIIMS Enterprise Workspace

My DIIMS

Hi Shubhdeep, this section is customized to help you navigate within DIIMS and find your content.

DIIMS Links
- Department Folders
- My Favourites
- Personal Workspace
- Saved Searches
- Advanced Search
- Recycling Bin

DIIMS Reports
- My Recent Docs
- My Recent Emails
- My Recent Folders
- My Division's RED
- My Division's Recent Folders

DIIMS Links	DIIMS Reports
Department folders: Allows access to the complete folder structure for the department **My Favourites**: Provides shortcuts to the frequently used folders and documents as configured by each user **Personal Workspace**: Allows to save data which is not work related and strictly personal **Saved Searches**: List all the search queries saved by the current user **Advanced Search**: Provides access to search with advanced features **Recycling Bin**: Enables access to Recycle bin to help Restore or permanently delete items from DIIMS (7 day limit applies)	**My Recent Docs**: Lists recently accessed documents by the current user **My Recent Emails**: Lists recently accessed emails by the current user **My Recent Folders**: Lists recently accessed folders by the current user **My Division's RED**: Lists all the Recently Edited Documents (RED) within the user's division **My Division's Recent Folders**: Lists all the recently accessed folders within the user's division

DIIMS Support

The DIIMS Service Desk should be the first point of contact for any DIIMS related issues.

Contact Information
- 1-867-920-3078
- DIIMS@gov.nt.ca

Support Links
- DIIMS Alerts
- Remote Assistance Request
- DIIMS Service Desk Info
- View Open Tickets
- External Access Form

Support Links

DIIMS Alerts: Redirects to the folder listing all DIIMS alerts sent out by the DIIMS team
Remote Assistance Request: Opens a new email. Send this email when asked by the DIIMS Helpdesk personnel to allow them remote access to their machines
DIIMS Service Desk Info: Downloads a PDF document which contains information about the DIIMS Helpdesk policy , procedures and Frequently Asked Questions
View Open Tickets: Provides a list of all the tickets sent to the DIIMS helpdesk by the current user
External Access From: Opens a form which when filled and submitted will send a request to the DIIMS Helpdesk to create a DIIMS external account for that user.

Records Management

This section has links to records management functions for classifiers and coordinators.

RM Links
- Classifier Reports
- Search Labels
- Search Transfers
- My Borrowed Items

Guides
- Records Classifier Guide
- GNWT ARCS

RM Links	Guides
Available for users with a classifier account only. **Classifier Reports**: Reports needed by classifiers in each department to run reports like Files eligible for Transfer or Destruction. **Search Labels**: Provides quick access to see the list of all labels created by the current user **Search Transfers**: Allows to search transfer based on their name and other criteria **My Borrowed Items**: Lists all the files and boxes checked out to the current user	**Records Classifier Guide:** Contains instructions for creating Boxes, Volumes (physical files), transfers etc. **GNWT ARCS**: Provides detailed information about the Administrative Records Classification (ARCS) filing structure along with scope-notes. Aids in finding the correct folder when trying to save a document in DIIMS

DIIMS Tutorials	**Training Guides**	**GNWT Links**
Contains links to the video tutorials for DIIMS End-Users and Classifiers. Users can contact the DIIMS Helpdesk if they need video tutorials on topics not already covered	Contains links to DIIMS guides, FAQs, Tips and Tricks in text format. Users are encouraged to contact the DIIMS helpdesk should they find any errors or for adding new content in this area	Contains links to the websites commonly used by all departments like SAM, PeopleSoft, Phone directory etc. Department specific SharePoint sites are also listed within this section

4. Navigating the DIIMS Web Interface

The GNWT DIIMS Enterprise Workspace provides a one-stop location to view GNWT information, search for information, and access various areas of the DIIMS repository.

The same layout and toolbars are available in each sub-level of the GNWT hierarchy.

Security access to the corporate folder structure has been assigned according to the corporate file plan. Permissions are inherited by folders and documents, therefore each individual user has the ability to view and edit items based on their access permissions.
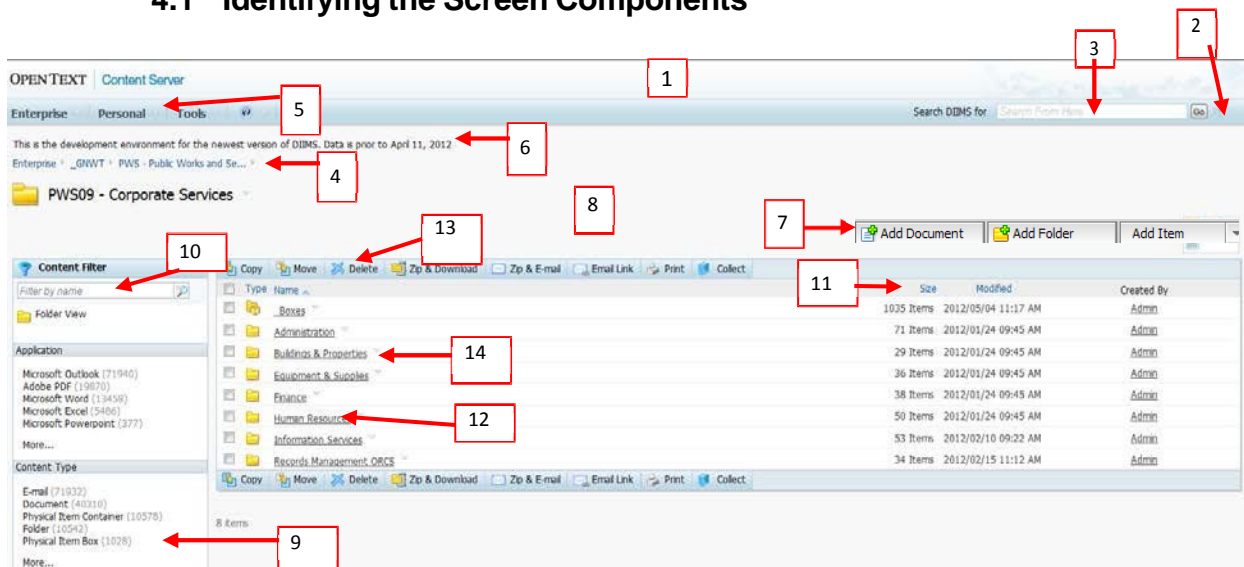
4.1 Identifying the Screen Components

Figure 1-2: The GNWT Enterprise Workspace

1	Masthead	Displays the name of the current workspace and folder.
2	Search Dropdown Bar	Displays the search tools and search parameters used to locate information in the DIIMS repository.
3	Search Field	Entry field for search keywords.
4	Breadcrumb Trail Menu	Displays a hyperlinked path to the current location in the repository. Users may change the personal display to a drop-down view.
5	Global Menus	Displays the Workspace menus, Tools and Help, and a sub-menu of commonly used items.
6	News Player	Broadcasts information to designated audiences. (not shown)
7	Add Document, Folder & Item	Enables a user to add documents, folders and items if he or she has sufficient permissions.
8	Featured Items	Provides easy access to folders and other items which have been promoted to the featured items area by the folder owner or administrator. (not shown)
9	Content Filters	Displays information grouped by facets to allow for quicker retrieval of information
10	Page Filter & Search	Enables users to filter the display by item type or to search on a value.
11	Column Names	Displays the **Type** of application and the **Name**, **Size** and date last **Modified** of the listed items.
12	Item Names	Lists item names in hyperlink format, which can be clicked to open items for viewing.
13	Multi-select Batch Operation Bar	Enables users to perform document management functions on multiple items.
14	Functions Menu	Displays the list of operations that may be performed on the item.

*Table 1-1: Enterprise Workspace items*

5. Accessing and Adding Information

There are several ways to access and add information within DIIMS, See Figure 1-3

1	Search Bar	Searches for information in DIIMS. *See Chapter 5, 'Searching for Information.'*
2	Drag & Drop Tab	Imports information into DIIMS from the desktop by dragging and dropping into the window. *See Chapter 2, section 2.3.5 for more information.*
3	Multi-select Operation Bar	Allows users to copy, move and send email links for multiple items by checking the boxes beside the item names.
4	Add Item Bar	Adds documents, folders or other items.
5	Functions Menu	Displays commands that can be performed on the item.
6	Quick Access Commands	**Edit**, **Open**, **Download**. These commands are only listed if the user has the specific permissions to perform these operations.
7	View Filters and Go To	'**View Filters**' filters items by selected criteria or search words. '**Go To**' allows users to move to the next page or to jump to a

Table 1-2 methods to access information

Figure 1 The GNWT Enterprise Workspace
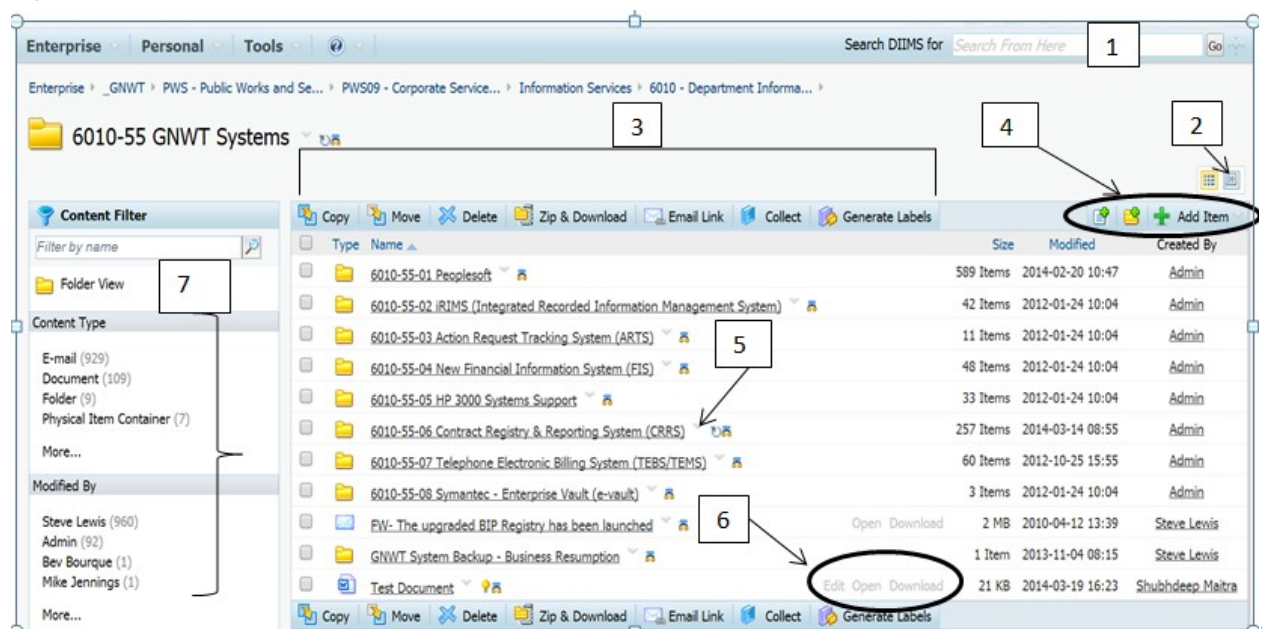
6. The Workspaces

DIIMS provides workspaces and workspace tools that enable the use of an appropriate workspace for each type of work: public or private.

There are two types of workspaces:

1	The Enterprise Workspace	This workspace is the corporate repository for all work related information including: • Drafts • References • Correspondence • Final documents All Information is organized in folders that reflect the GNWT ARCS/ORCS systems. i.e., the Enterprise Workspace could be considered as a replacement for the H:\, J:\, I:\ and G:\ drives.

2	Personal Workspace	Each user has their own personal workspace which is used to personalize DIIMS to their personal preference. The employee has sole access and control to items under the personal workspace unless access rights have been given to other employees.
		
		The personal workspaces will be monitored on an ongoing basis to ensure that GNWT records are being stored in an accessible location. (Enterprise Workspace)
		
		Examples
		• Shortcuts
		• Collections
		• Saved Searches
		• Virtual Folders
		• Non Business Related Documents
		   o Resumes
		   o Performance Appraisals
		   o Hockey Pool

Table 1-3: The Workspaces

7. DIIMS Item Types

Corporate information is stored in various formats – electronic documents, spreadsheets, images, URLs and social media content.

DIIMS organizes these item types by category and identifies the items with specific icons.

DIIMS Items	
Workspaces	
The Enterprise Workspace Enterprise My Workspace	Workspaces contain information that may be organized in a hierarchical folder structure, with relevant access applied to folders and contents.
Containers	
Folders	Virtual folder that contains documents and other items (images, etc.).
Physical Items Box Drawing Volume	Physical Boxes, Volumes, Drawings that contain paper and require labels. These items are created by departmental records classifiers & coordinators.
Document Types	
Documents	An electronic file and its versions.
Hyperlinks	
Generations	The anchor identifies the item and points to an unchangeable version of a document.
Shortcuts	Pointers to items stored elsewhere in the Repository.
URLs	Hyperlink to a page on the internet/intranet.
Queries	Search criteria saved for reuse.
Snapshots	The saved results of a specific search.
Collections	A set of content that a user has gathered by selection or collected using a search.
Work Processing Items	
Tasks and Tasks Lists	Containers to manage tasks, for personal and team-collaboration work.

Table 1-4: DIIMS Items

8. Using the Functions Menu

Each DIIMS item displays a **Functions** menu that enables users to perform actions on that item. The functions available depend upon the item type and the user's permissions.

Figure 1-4: Function menu

To facilitate locating the action to perform, functions are grouped by action type as described in table 1-5.

Download
Open
View as Web Page
Add Version
Edit
Rename
Add to Favorites
Copy
Make Shortcut
Set Notification
Reserve
Print
Set Security Clearance
Zip & Download
Zip & E-mail
Properties ▸
  General
  Specific
  Audit
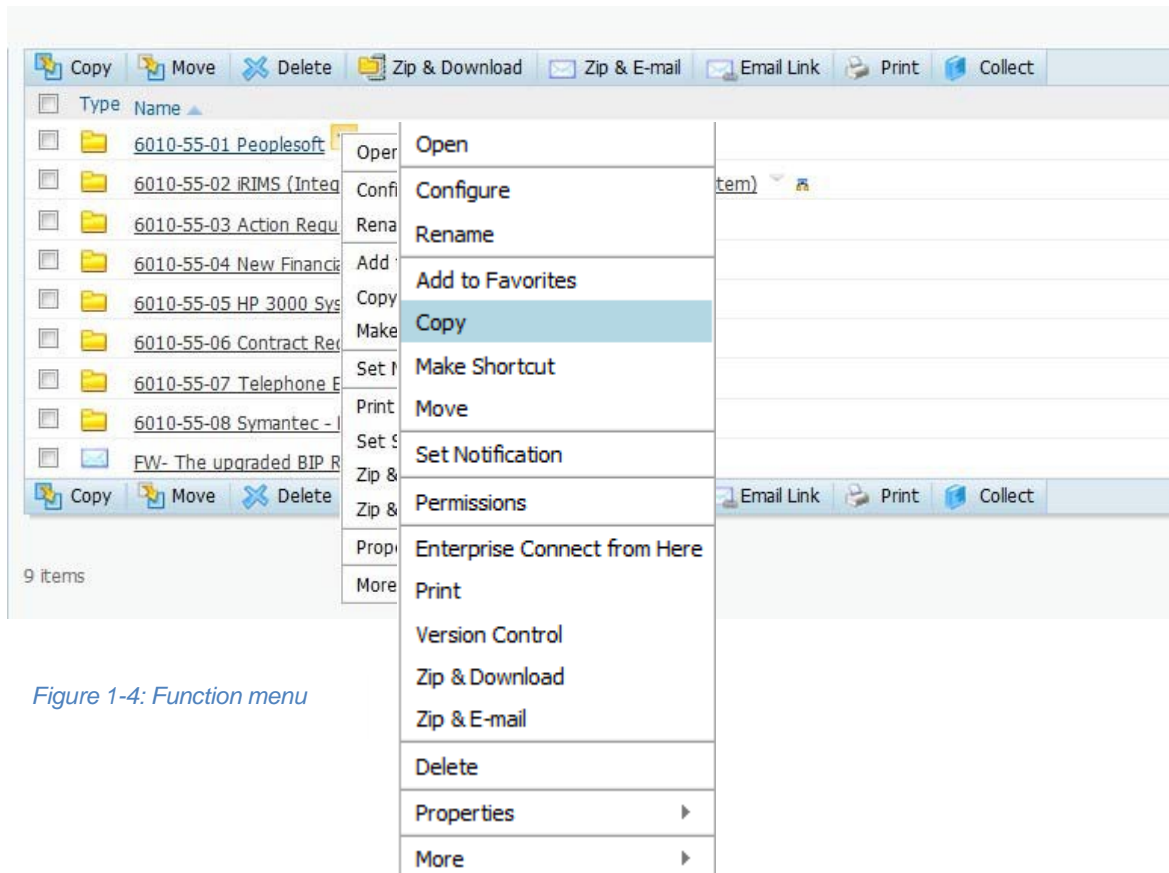 Categories
  Classifications
  Holds
  Ratings
  Records Detail
  References
  Versions
  WebDAV

Figure 1-5: the Functions menu

Document and Item Functions Menu	
Get it – retrieves the items	
Download	Read-Only action. Copies a document stored in DIIMS to a specified local drive.
Open	Read-Only action. Downloads a copy of the document and opens it in its native format. (Note: Changes to documents opened using this method are not saved as new versions of the original. 'Open' acts like the "Save As" function in Microsoft Office.)
View as Web Page	Read-Only action. Converts the document format to HTML for easy viewing
Affect its content – modifies item functions	
Add Version	Adds a version to the selected document.
Edit	Opens the document in read-write mode.
Rename	Allows the user to rename the selected item.
Affect its location - provides access to items	
Add to Favorites	Adds a link to the document in your **Favourites** container.
Copy	Copies the item to a specified location within DIIMS.
Make Generation	Identifies the version as an important version that cannot be changed or deleted.
Make Shortcut	Creates a link to the selected item.
Move	Moves the selected item from one location to another specified location.
Track it – notifies the user of updates	
Add Follow Up	Flags the selected item for further attention
Set Notification	Sets up a notification alert for updates to a selected item.
Communicate it – publishes and rates the item	
E-mail	Opens the e-mail application and attaches the item as a copy or a link.
Explore from here	Defines the search parameters
Affect access – controls user access to the item	
Permissions	Enables users to define access to an item, providing they have permission to assign access.
Reserve	Locks the document for editing.
View and download - views item information	
Overview	Provides a description of the item and the functions that can be performed on it.

Subscribe to Rendition	Notify users of changes to selected item
Zip & Download	Zip & Download
Remove it - Purges item information	
Delete	Deletes the selected item and its versions.
Properties Submenu - Displays information and metadata	
(Sub-menu Items) General, Specific, Audit, Categories, Classifications, Ratings, References, Versions, Records Detail	Opens document information tabs that contain specific information about the document.
More	
Configured by Administrator	Stores less commonly-used commands
Table 1-5: The Functions Menu	

9. Viewing Documents

9.1   Viewing Document Content

DIIMS provides several ways to view the content of your documents:

Download	Enables user to save an item to an external folder: Click Download from the context menu. *The Save As window appears.* Navigate and select a folder to store the item.
Open	Opens the item in the native format. Click Open from the context menu. *The item opens in read-only mode.*
View as Web Page	Opens the item in the html format Click the document title to view in HTML format for easy viewing.
Edit	Opens document in edit-mode for those who have edit permissions

Note

All three methods to view the content are in read-only mode. To modify an item, open the item with the Edit command

Table 1-6: Viewing Document Content

9.2   DIIMS Item Metadata

An item's properties (document descriptors) are saved as metadata in the **Properties** page (accessed under **Properties** in the document's **Functions** menu). The tabs that display are dependent on the configuration by the System Administrator and your permissions.

Figure 1-6: DIIMS Metadata – Enterprise Workspace view

Document Properties Tabs	
General	Displays common information, such as name, description, creator and last-modified date.
Specific	Displays information unique to the item type.
Audit	Lists an audit trail of all activities performed on the item.
Categories	Displays the list of categories applied to the item.
Classifications	Displays the classification applied to the item (taxonomy and record classification).

Follow Ups	Displays items flagged for follow-up.
Holds	Displays items flagged for hold
Records Detail	Displays the record management information applied to the item.
References	Lists the links to the document, such as shortcuts and generations.
Versions	Lists the versions of the item.
Presentation	Enables configuration options for folders only.
WebDav	Displays the URL used to access and edit DIIMS items from a WebDav server.
Xreference	Displays cross-reference information for the item.

Table 1-7: Document Properties Tabs

10. Summary

In this module, you have learned:

- The components of DIIMS
- The purpose of DIIMS at the GNWT
- The benefits of DIIMS
- How to navigate the DIIMS Enterprise Workspace
- Information may be organized in 2 workspaces: The Enterprise Workspace, and the Personal Workspace
- Information is stored in various formats: documents, folders, hyperlinks and collaboration tools
- DIIMS users may view an item in read-only mode using three different methods: View as Web Page, Open and Download
- DIIMS stores system attributes (metadata - item descriptors) in the Properties tabs at the point of creation for each item.

Module 2   Adding Content to the DIIMS Repository

OBJECTIVES

A central repository enables business users to share corporate information with designated groups or individuals within the organization from one central information repository. This approach preserves document integrity and facilitates information retrieval, collaboration and information management.

In this module, you will learn to:

- Add content to the DIIMS repository
- Create and add folders
- Create and add MS Office documents
- Import existing documents
- Add emails to a DIIMS folder
- Move, copy and delete documents using bulk commands.

1. Adding Information

Adding information to the corporate repository in DIIMS is similar to adding information in the shared corporate folder structure: navigate to the folder where you want to keep the item, and then create it. The new item will inherit the classifications and permission access from the folder level.
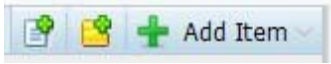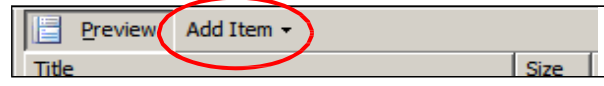
You may add items to the repository in several ways:

	Add Item bar	Add documents, folders or other items separately. Users must have permission at the folder level to add items **Web Interface** **Enterprise Connect Interface**
2	Drag & Drop (Web)	Import items in bulk from your Desktop or drive location into DIIMS.
3	Outlook	From the MS Outlook Interface, drag and drop emails to DIIMS. Add to the DIIMS upon sending an email.
4.	Windows Explorer	Drag and Drop from within the Enterprise Connect interface

Table 2-1: Methods to add information

2. Adding Folders

A DIIMS folder performs in a similar manner to your network-shared directories: it is a container used to organize your information. Permissions applied at the folder level are inherited by the items added to the folder. However, once added to the folder, an item's access permissions may be modified on an individual basis by the item creator or those who have permission.

Users may add documents to a folder if they have permission to do so; otherwise, the Add Document function is inactive.

DIIMS Folders that have a File Number in the name is managed by Departmental Records Management staff. New folders can be created inside the managed folders.

📁 6010-00 Policies and Procedures ⊡ ♫
📁 6010-01 General ⊡ ♫
📁 6010-15 Business Continuity Plans ⊡ ♫

If a new file number is required, contact your Departmental Records Coordinator.

To add folders to DIIMS:

Navigate to the location where you want to add a folder.

Click **Add Folder** from the **Add Item** bar. *See Figure 2-1. DIIMS opens the* ***Add Folder*** *page. See Figure 2-2.*

Figure 2-1: The Add Folder button – Web Interface

Figure 2-2: The Add Folder page

4. Complete the **New Folder** page with the required information:

1	Name	Enter the name of your folder. e.g. *DIIMS Documentation*
2.	Description	Enter a description. The information is indexed (searchable), which enables users to use the text as criteria for a search.
3	Type	Select a different folder icon when appropriate.
5	Classifications	This information should be inherited from the Parent Folder.
6	Categories	This information should be inherited from the Parent Folder.
7	Create In	Click **Browse** if you want to select another location within DIIMS.

Table 2-2: Add Folder information

5. Click **Add**. *The new folder is added to the location you specified.*
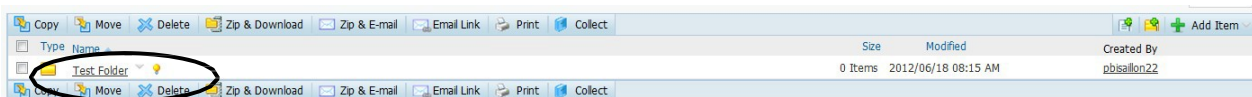

Figure 2-3: The New Folder

3. Adding Documents

Business users may create, share, collaborate on, and manage their corporate information from within the DIIMS repository. Corporate information may have various types of formats: documents, meeting agendas, maps, reports, images, financial spreadsheets and letters.

A document's author may assign different levels of access to documents: one level of access for their specific colleagues and another level of access for the organization.

There are several ways to add documents to the DIIMS Repository:
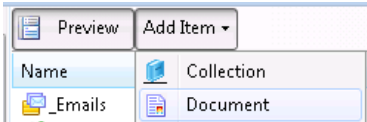
1	Import	There are **three** ways: 1. From the **Add Document** menu, select **Document**>**Existing** to add an existing document currently located on the Desktop or any other drive. 2. Using the **Drag & Drop** function to add several documents or items from DIIMS containers. 3. Use Drag & Drop function in the Enterprise Connect interface
2	Add Word, Excel, PPT, Document	There are two ways: 1. From the **Add Document** menu, select the **New** > **MS Office** document type from the drop-down option. 2. From **MS Office**, select **Save As** >to the **DIIMS** repository

Table 2-3: Methods to add information

3.1 Adding an Existing Document

Use the **Add Document** function to copy a document that currently resides on a local or shared drive to the DIIMS Repository.

To add an existing document:

1. Navigate to the folder where you want to add the document.
2. Click **Add Document** from the **Add Item** bar, (it appears only if you have permission to add documents to this folder. *See Figure 2-4*). *DIIMS opens the Add Document page. See Figure 2-5.*

Figure 2-4 The Add Document button

Figure 2-5: The Add Document page with Existing selected

3. Complete the **Add Document** page:

1	Document	Keep the default selection of **Existing**, 1. Click **Browse**. *The Choose File to Upload dialogue box opens,* 2. Navigate to the document and click **Open**. *The path to the document appears in the existing document field.*
2	Name	Enter the document name if you want to rename it. e.g. *Searching Statistics*
3	Description	Enter a description. The information is indexed (searchable), which enables users to use the text as criteria for a search.
4	Version Control	DIIMS creates a new version *each time a document is modified.* Select **Standard** (linear) or **Advanced** (major/minor).
5	Classifications	This information should be inherited from the Parent Folder.
6	Categories	This information should be inherited from the Parent Folder.
7	Create In	Verify the location; click **Browse** if you want to select another folder.
8	Click Add	Adds a copy of the document to DIIMS.

Table 2-4: Add Existing Document Page

3.2 Adding a New Document

The **Add Document** function enables you to create a new MS Office document in DIIMS.

NOTE

If you need to add a document other than from the MS Office Suite, you need to create it in the native format and then import it as an Existing document using the procedure outlined in section 2.3.1 Adding an Existing document.

To add a new document to DIIMS:

1. Navigate to the location where you want to add the new document.
2. Click **Add Document** from the **Add Item** bar. *See Figure 2-6. DIIMS opens the **Add Document** page. See Figure 2-7. Note: the default setting is for adding an existing document.*

Figure 2-6: The Add Document button

3. Select the **New** document. *See Figure 2-7.*

Figure 2-7: The Add Document page with New selected

4. Complete the **Add Document** page:

1	Document	Select **New Document**, Select the **Microsoft application** from the dropdown list.
2	**Name**	Enter the document name.
3.	**Description**	Enter a description. The information is viewable from the file list and is indexed (searchable), which enables users to use the text as criteria for a search.
4	**Version Control**	DIIMS creates a new version *each time a document is modified*. Select **Standard** (linear) or **Advanced** (major/minor).
5	**Classifications**	This information should be inherited from the Parent Folder.
6	**Categories**	This information should be inherited from the Parent Folder.
7	**Create In**	Click **Browse** if you want to select another folder.
8	**Add**	DIIMS opens the application and displays the **DIIMS Edit Instructions** message see figure 2-8:

Table 2-5: Add New Document Page

5. Click **OK.** *The message window closes and the application page is active.*
6. Create your document: *Enter 'My New document version 1'*

7. When you complete your edit session, click the **X** to close the editing session, even if it is a work in progress. *The **Finish Edit** window appears. See Figure 2-9.*

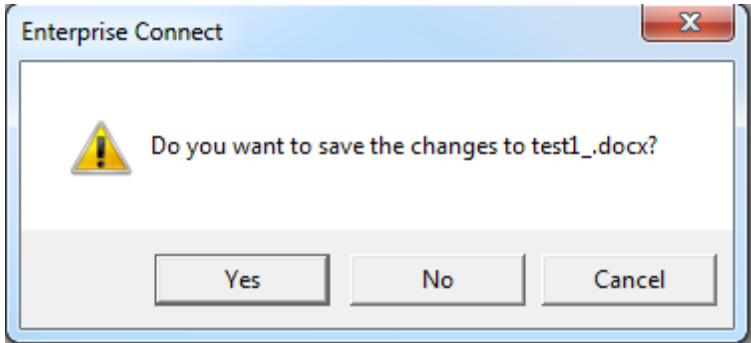*Figure 2-9: The Finish Edit* message

8. The **Finish Edit** options enable you to:

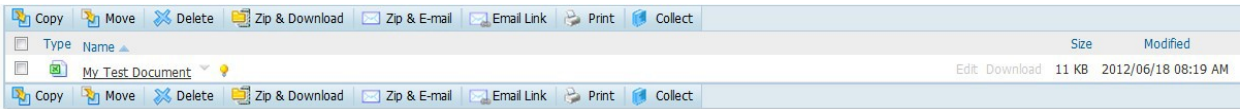| Yes	The modified document is saved to DIIMS.
No	The modified document is not saved to either DIIMS or locally.

Figure 2-10: New MS Office document

3.3 Importing Items Using Drag & Drop

The **Drag & Drop** function provides a quick way to add (import) several items to DIIMS.

To import multiple items with Drag & Drop:

1. Ensure the items you want to import are located on your computer desktop or that you have Windows Explorer open on your desktop.
2. In DIIMS, navigate to the container where you want to import your items.
3. Resize and reposition the DIIMS web window to the side so that you can see your Desktop. See figure 2-12.
4. Select the items on your Desktop or in the Windows Explorer window and then drag and drop them onto the folder in DIIMS. *The items appear in the **DIIMS** folder*
5. A system message indicates the items are in the process of being copied.
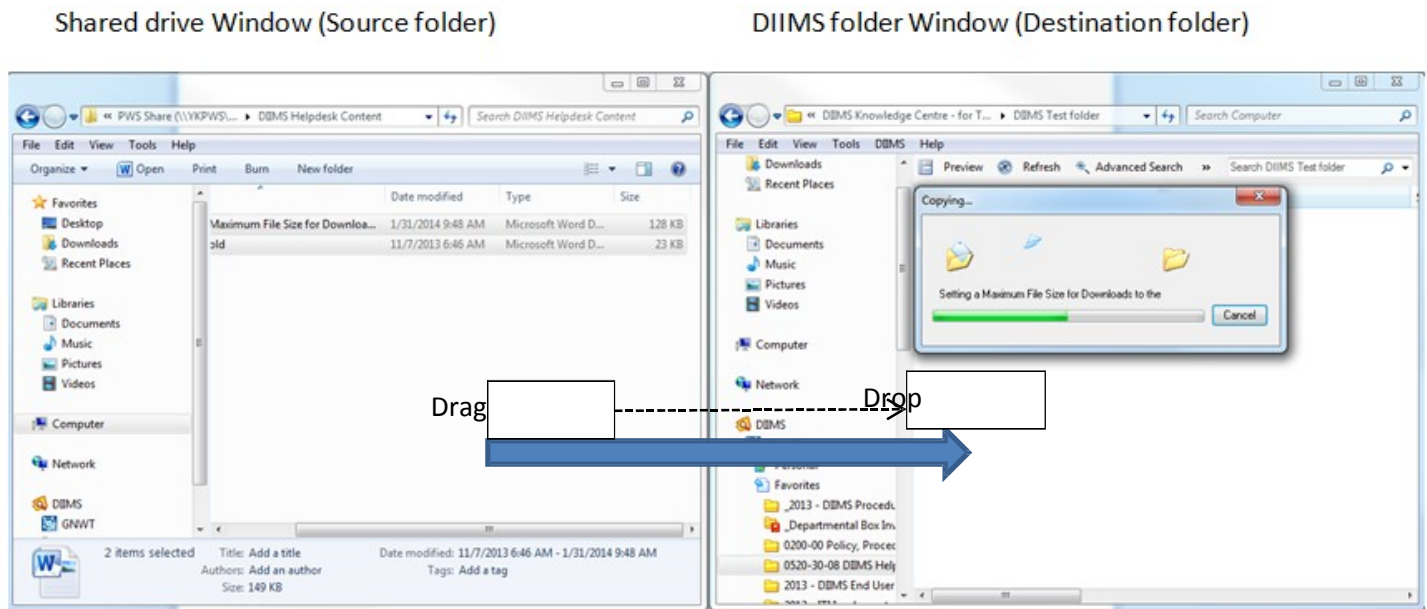

Figure 2-12: Drag & Drop

3.4 Using the Bulk Commands in DIIMS

The multi-select commands on the workspace and folder pages enable users to bulk manage folders and documents.

To bulk manage items:

1. Navigate to the location where the items you want to manage are located.
1. Select the items you intend to manage, either by checking each item's checkbox or by checking the multi-check box at the top of the list of items.

Multi-select checkbox

Individual checkboxes

Bulk command bar

Figure 2-14: Bulk Command Bar
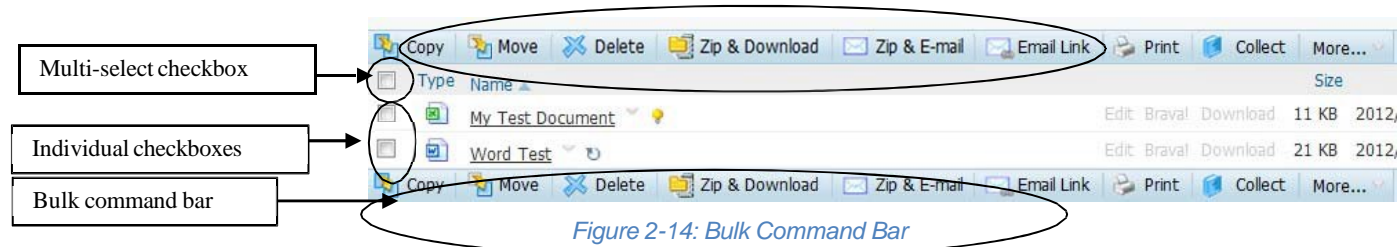
2. Click a command on the **Bulk** command bar to manage the items:

Copy	Opens the **Copy** folder window to copy the selected items to a new folder. *See Figure 2-31.*
Move	Opens the **Move** folder window to move items to a new folder.
Delete	Opens a **Delete** confirmation window and, after confirmation, deletes the selected documents.
Zip & Download	Zips and downloads items to a specified location on your local or shared network drive.
Email Link	Will generate an email with a link to the selected document.
Collect	Adds the selected documents to a collection.

Table 2-6: Bulk Commands

Figure 2-15: Copy Folder window

4. Summary

In this module, you learned how to manage and share corporate information by:

- Create folders, add document content by creating new documents, text documents, importing external documents, and importing emails
- Save existing emails to DIIMS
- Add attachments from the DIIMS repository to emails
- Save emails upon sending
- Classify emails to the DIIMS upon send
- Move items using the Bulk command

Module 3   Working with Your Documents

Information stored in DIIMS may be accessed department-wide. DIIMS functionality provides business users with the ability to limit access to information they are responsible for. Permissions to folders and items may be applied to individuals and groups on an as-needed-basis. This function enables business users to share information responsibly and efficiently while they perform their daily tasks.

In this module, you will learn to:

- Control access to your information
- Modify your documents online and offline
- Reserve and unreserve documents
- Create versions
- Manage versions
- Create generations

1. Managing Access to DIIMS Information

When working in a collaborative environment, it is essential to protect the integrity of our corporate information, to ensure that information is only accessible to designated groups and individuals, and to track the development and evolution of corporate information.

For this purpose, DIIMS provides several functions to manage the access and production of information:

Permissions	Allows document authors to assign access control permissions to limit access to others.
Reserving Documents	Locks down access rights to read-only for others while one user modifies the document.
Notification and Auditing	Advises users of modifications to documents or other items. A trail of all activity on the item is preserved.
Version Control	Creates a new document version with each on-line editing session. Limitations to the total number of versions retained can be set by the System Administrator.
Versioning	Saves versions as **Standard** (linear) - 1, 2, 3, etc. or **Advanced** (major/minor) - 0.1, 0.2, 1.0, 1.1, etc.
Add Versions with Drag & Drop	Adds new versions to items using the **Drag & Drop** feature.

2. Assigning Access to Your Documents

Document authors may assign permissions to groups by assigning access permissions. Groups may have different levels of access permissions to the same document.

To assign access permissions:

1. Locate your document in the folder.
2. From the document's **Functions** menu, select **Permissions**. The **Permissions** window displays. Permissions may already be assigned to groups and individuals if they were assigned at the folder level.
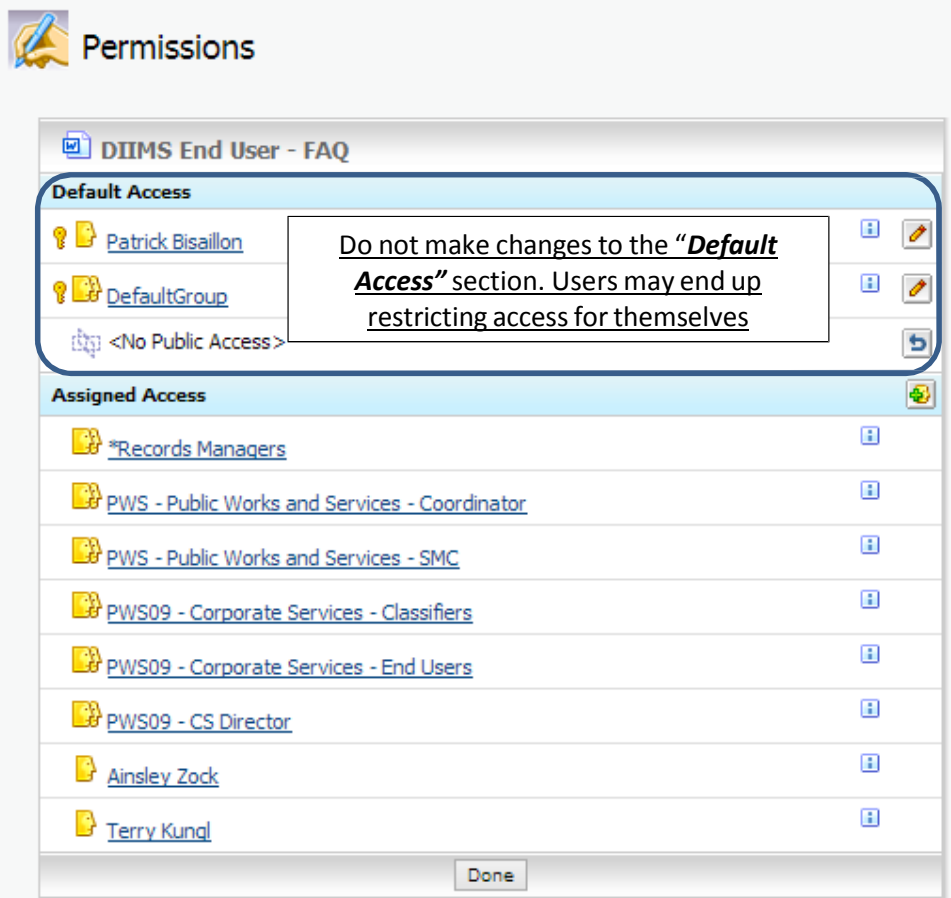
Figure 3-1: Document Access Permissions

3. In the **Assigned Access** window, click 🔁 to display the user list. *The Permissions window appears.*

4. In the **Grant Access to** field, search for the group name. *See Figure 3-2.*Users are found by last name, first name, login name or e-mail address. Groups are added by searching for and selecting the group name. If the search field is left empty, a list of all users or groups is displayed in the results.

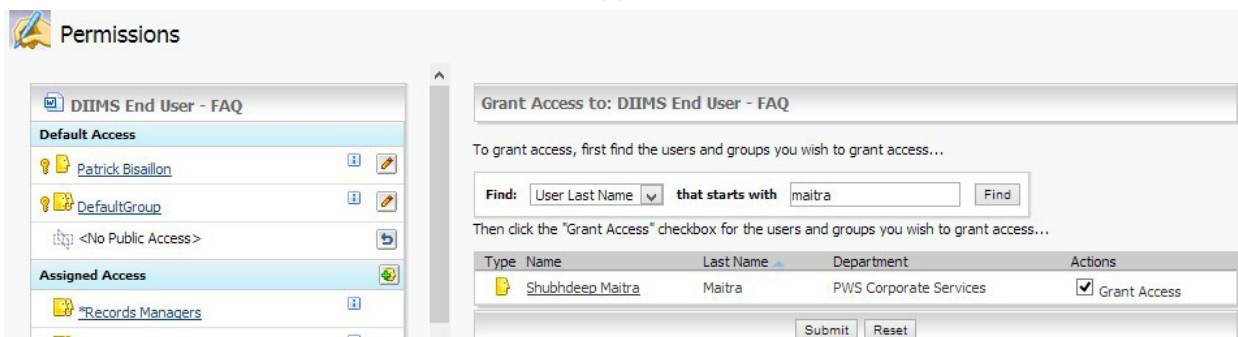5. Click **Find**. *A list of names appears beneath the **Find** field.*

Figure 3-2: Grant Access search window

6. Check the **Grant Access** check box beside the user or group name to whom you want to assign access.

7. Click **Submit**. *The name appears in the **Assigned Access** list.*

8. In the **Assigned Access** window, click on the user or group name you just added. *The **Edit User Permissions** screen appears to the right of the access window.*

9. Assign access by checking the access check boxes for each type of permission. See Table 3-1.
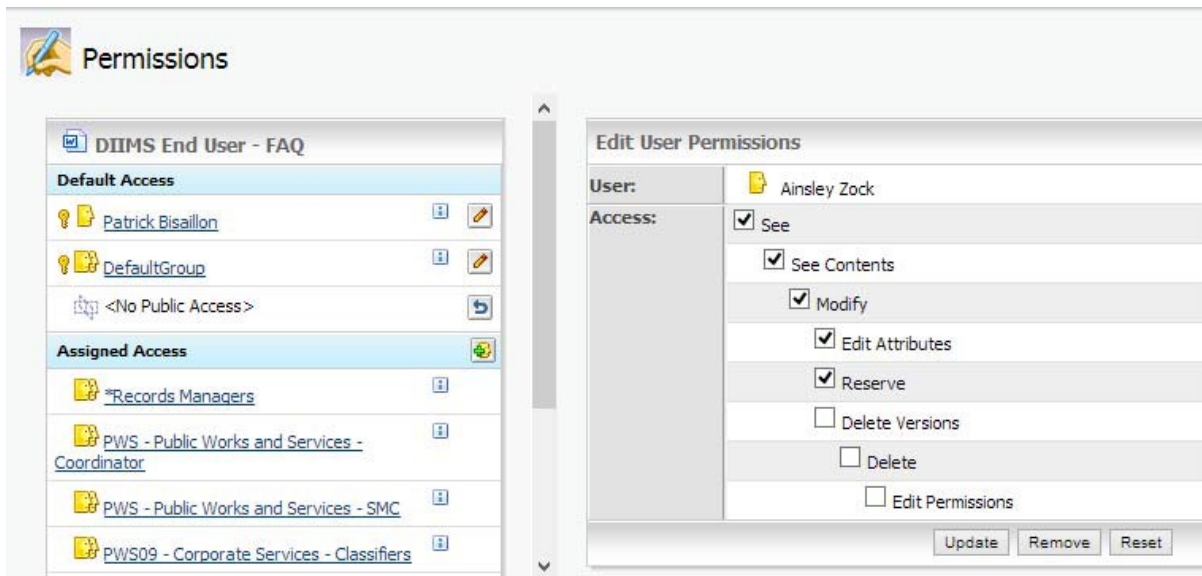

Figure 3-3: Assign Access

Business users may apply access permissions to documents they own or for which they are responsible. The permission levels are:

Permission	With this permission . . .
See	You can see the item in its container but cannot open it.
See Contents	You can open the item and see its contents.
Modify	You can rename the item and modify some of its properties. For container items, such as Folders, this includes the properties that are listed on the item's Presentation Properties tab.
Edit Attributes	You can apply Categories to the item or modify the item's Categories or the attributes they contain.
Add Items	You can add items to the item. This permission is only available for container items.
Reserve	You can *reserve* the item (to prevent other users from modifying it); modify it, and then unreserve the item. You can also add Versions to items you unreserve. This permission is only available for items that can be reserved.
Delete Versions	You can delete Versions of the item. The Delete Versions permission is only available for items that have Versions, such

	as Documents and Workflow Maps.
Delete	You can delete or move the item.
Edit Permissions	You can edit the permissions that other users or groups have on the item

Table3-1: Permissions

10. Click **Update**.
11. Proceed to the next person's name in the **Assigned Access** window and follow the same process to assign the access rights.
12. Click **Done** when all rights have been assigned.

3.   Modifying your Documents

DIIMS tracks the development of documents and other items saved to the DIIMS Repository through the version-tracking process. Each document's editing session is saved as a new version. Please refer to section 4, Document Versions.

The first time a document is saved to DIIMS, as a new document or as an imported (existing) document, it is saved as version 1. Subsequent on-line editing sessions are saved as new versions, the most recently-added version being at the top of the list and with the highest version number. *See Figure 3-4.*

Note

Only the latest version can be modified. The older versions are read-only.

Version ▼	File Name	Size	Created	Created By
3	test1.docx ▽	22 KB	2013-08-07 16:26	Shubhdeep Maitra
2	test1.docx ▽	22 KB	2013-08-07 16:25	Shubhdeep Maitra
1	test1.docx ▽	21 KB	2013-08-07 16:14	Shubhdeep Maitra

Figure 3-4: Standard Version Properties

DIIMS provides two methods to edit documents:

1. **Edit online** - Enables you to access and edit the document directly from the DIIMS Repository. This method is available only for MS Office suite applications. The item is automatically reserved during editing; other users have read-only access.
2. **Edit offline** - Enables you to download and edit a document while it is a work-in-progress; after completion, it is uploaded and saved as a new version. The item must be manually reserved, provided the author/editor has sufficient permissions, and unreserved when the new version is ready to be uploaded.

3.1   Editing MS Office Documents

When you open a document to modify it online, the edit process:

- automatically reserves the MS document for editing,
- opens a copy of the most recent version, and
- saves the newly edited document as a new version.

3.1.1   Editing documents online

To edit a document online:

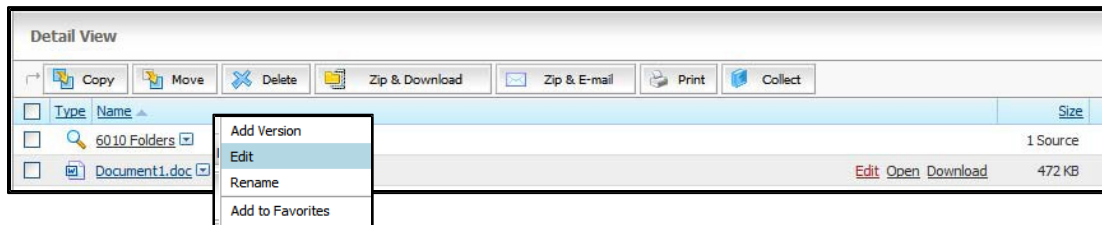1. Click **Edit** in the document's **Functions** menu, or click **Edit** in the **Quick Access** commands.

Figure 3-5: Edit in the Quick Access commands

2. Alternatively, you may open the document for editing from within the document's **View as Web Page** or **Properties** page.
3. It is recommended that you save your document at regular intervals while you are editing.
4. To finish the editing session, save, and then close the document by closing the document window (click the **X** in the upper right corner).

3.1.2 Editing Documents Offline

DIIMS enables users to download a copy to a local drive for editing in the offline mode. Once editing is complete, the document may be uploaded to DIIMS as a new version.

Edit a document offline when you want to:

- save a copy to a local drive (e.g. from which to work when you are away from the office);
- work within an application that cannot be launched directly from DIIMS; and/or
- collaborate with GNWT employees who are not using DIIMS yet (i.e.: download document to J :\)

To edit a document offline:

1. In DIIMS, navigate to the document you want to edit, and click on **Functions > Reserve**. *The **Reserve** page appears. See Figure 3-7. If **Reserve** does not appear on the menu, you do not have Edit permissions.*

Figure 3-7: the Reserve page

2. In the **Options** window, click "**Download** document to local drive". This will create a local copy of the most recent version. *See Figure 3-8.*
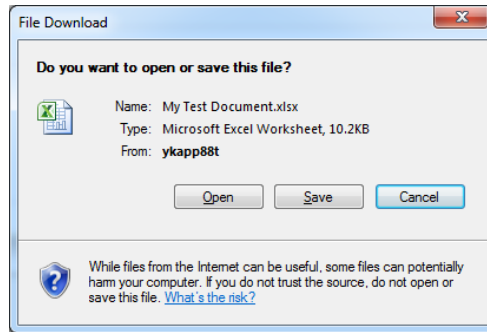
Figure 3-8: the File Download window

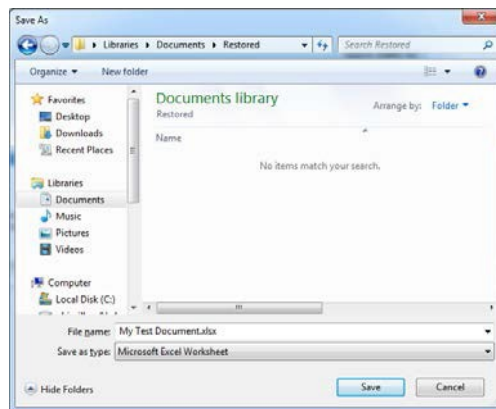3. Select a location on your Desktop. *See Figure 3-9. The **Reserve** page reappears.*

Figure 3-9: the Save As window

4. In the **Reserved By** field, select your name. *The group names in the **Reserve By** list are the groups to which you belong. If you choose a group, all users in that group who can access the document are able to **Unreserve** the document. See Figure 3-10.*

5. Click **Submit**. *DIIMS reserves the document and a **Reserved** check mark icon appears beside the document. Only you or the group selected in the **Reserve By** field of the **Reserve** document may **Unreserve** the document.*
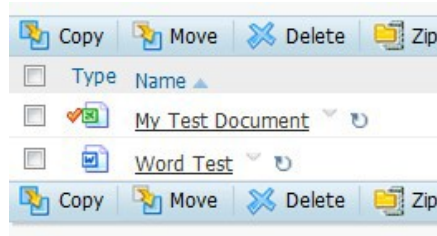

Figure 3-10: the checkmark

6. Alternatively, you may **Download** a document from the **Functions** menu to a local drive; however, this action does not reserve the document. Others may access and edit the document. *Perform this action only when you are the sole person who has edit permissions to the document.*

3.2   Adding New Versions

Once the editing of the offline document is complete, you may add it as the latest version of the existing DIIMS document.

There are several ways to add a new version edited offline:

1. Select **Functions> Add Version** from the document's **Functions** menu.
2. Use the **Drag & Drop** function
3. Select **Functions > Unreserve** from the Document menu, and check **Add New Version**.

3.2.1   Adding versions using the Add Version Command

To add a version edited offline:

1. In DIIMS, navigate to the document and select **Functions > Add Version.** *The **Add Version** window appears.*
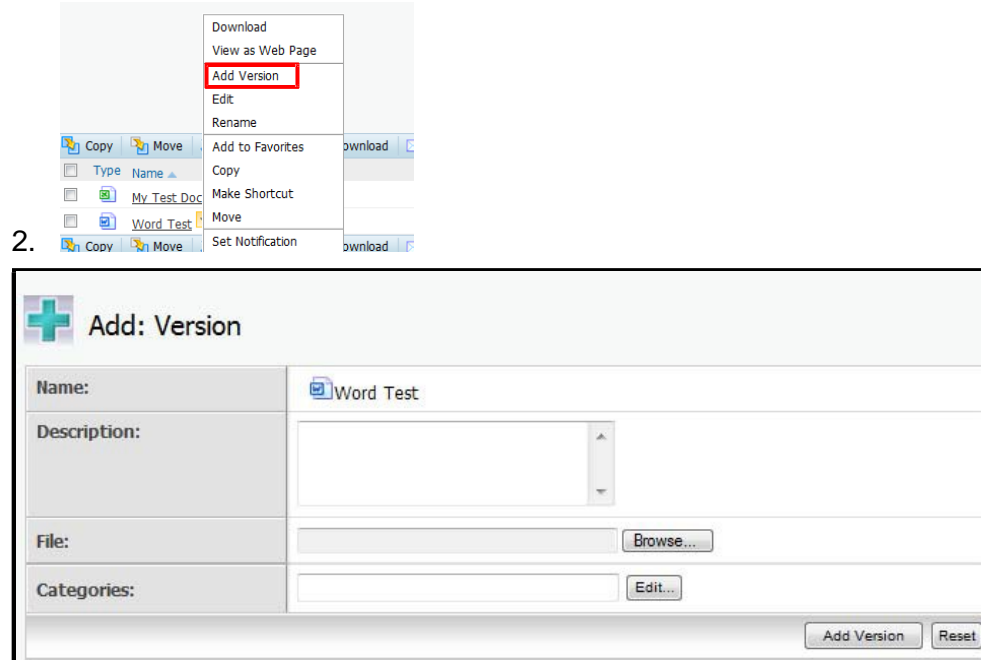

2.

Figure 3-11: The Add Version window

3. In the **Description** field, enter a concise description of the changes made to the version.
4. Click **File > Browse** to locate the document on your local drive. The document is not required to have the same name and can be created in a different application, e.g. version 1 was created in MS Word and version 2 was created in MS PowerPoint.
5. Click **Add Version**. *The new version is added to DIIMS.*

3.3 Adding New Versions Using Drag & Drop

Another method that can be used to add versions to existing documents is the **Drag & Drop** function.

To add a new version using Drag & Drop:

1. Locate the folder in DIIMS where you want to keep the new version of the existing document.

2. Activate the **Drag & Drop** tab and resize the DIIMS window so that you can access the document version on your Desktop.

3. Select the updated version on your Desktop (in this case, the document must be the same name and type) and drag and drop it onto the white space of the **Drag & Drop** tab. *A system message asks if you want to replace the existing file. See Figure 3-12.*
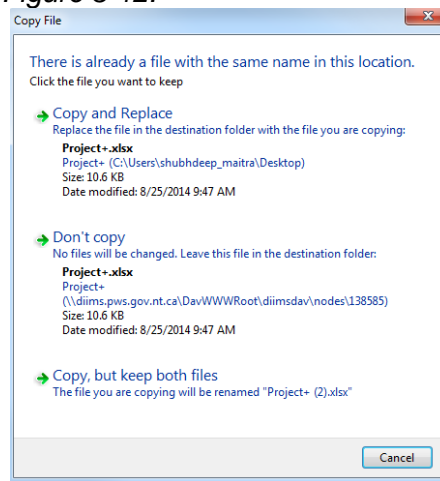

Figure 3-12: Confirm File Replace

4. Click ***Copy and Replace***.

5. Click **Continue**. *DIIMS adds the new version and returns you to the **Browse** window.*

6. **Add new version**>**Submit**. Verify that a new version is added to the document (**Functions > Versions**).
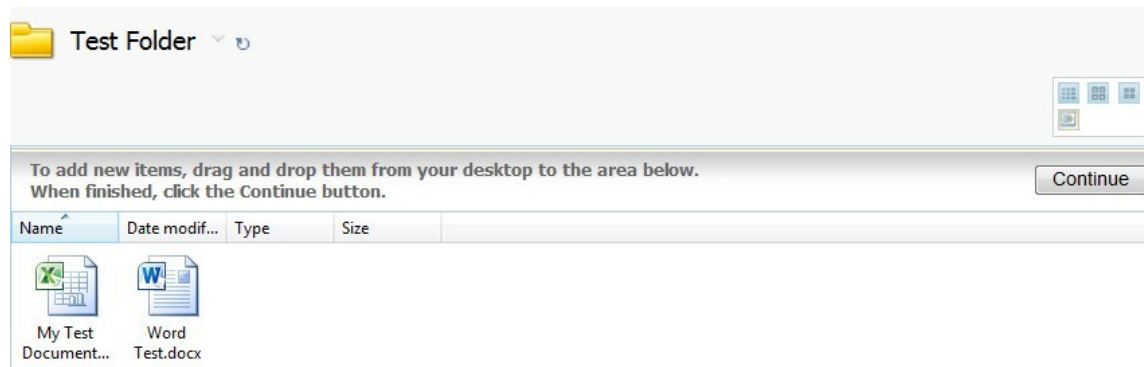

Figure 3-13: Add version using Drag & Drop

4. Reserving and Unreserving Documents

When you open a document, DIIMS automatically reserves the document and prevents users who have edit access to the document from opening the document to edit it.

However, occasions may arise when you wish to reserve a document prior to opening it. For example, you may want to:
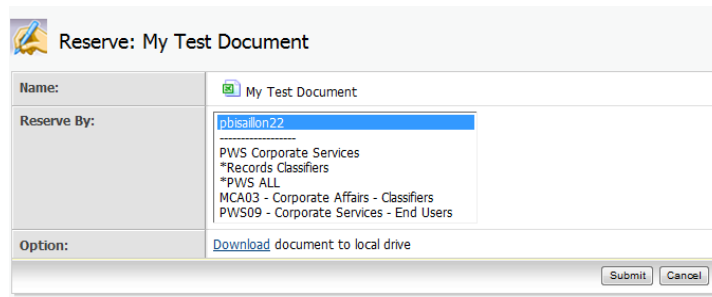
1. Perform offline editing for a work-in-progress document where you do not want multiple versions;
2. Perform offline editing when you are not at your own computer and do not want to download a document; and/or
3. Prevent others from editing the document (e.g. during the approval process).

You may reserve a document if you have Reserve permissions and the document is not already reserved.

4.1 Reserving Documents

Reserving a document

1. Limits other users to only **Open**, **Download** and **View as Web Page** commands;
2. Ensures the **Edit** function is active only to those who have reserved the document;
3. Removes the **Reserve, Add Version** and **Edit** functions from the **Functions** menu (for those who have Edit permissions to the document);
4. Adds a reserved check mark icon beside the document's name; and
5. Adds **Reserved By** and **Reserved** fields to the **Properties > General** page.

Reserve: My Test Document	
Name:	📄 My Test Document
Reserve By:	pbisaillon22 ------------------ PWS Corporate Services *Records Classifiers *PWS ALL MCA03 - Corporate Affairs - Classifiers PWS09 - Corporate Services - End Users
Option:	Download document to local drive
	Submit Cancel

Figure 3-14: the Reserve page

To Reserve a document:

1. Navigate to the document you want to edit, and click on **Functions > Reserve**. *The **Reserve** page appears. If **Reserve** does not appear on the menu, you do not have Edit permissions.*

2. Select the user or group from the **Reserve By** list.

3. Click **Submit**. *DIIMS reserves the document and a **Reserved** check mark icon appears beside the document. Only you or the group selected in the **Reserve By** field of the **Reserve** document may **Unreserve** the document.*

4.2   Unreserving Documents

Unreserving a document:

1. removes the reserve from the document to allow edits by other users;

2. redisplays the **Reserve**, **Add Version** and **Edit** commands to the Functions menu;

3. removes the Reserved check mark; and

4. removes the **Reserved** and **Reserved By** fields in the **Properties > General** page.

To unreserve a document:

1. Navigate to the document you want to unreserve, and click on **Functions > Unreserve.** *The **Unreserve** page appears*.
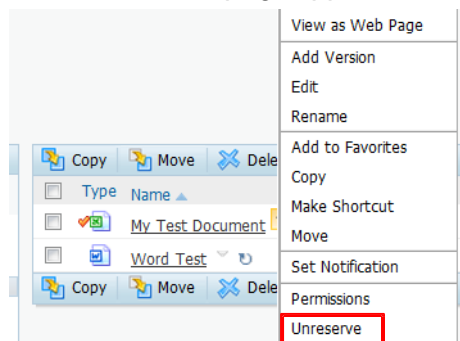
2. Check **Add New Version** to add the new version to DIIMS. *Additional fields **Description**, **File** and **Categories** appear. See Figure 3-12.*

Figure 3-15: the Unreserve window

3. Enter a concise description of the changes made to the version.
4. In the **File > Browse** field, navigate to and select your document.
5. Click **Submit.** *The document is now unreserved and the new version is added to DIIMS*

5.   Document Versions

One of the advantages of DIIMS is its ability to track a document's content development through the version tracking process.

In other systems, such as the shared system drive, it is necessary to create a separate document for each version of a document. In DIIMS, a document acts as a container for all associated versions of the same document.

The **Versions** page lists the versions in order; the most recent version, which will have the highest version number, will appear at the top of the list. This approach prevents confusion and enables easy identification of the most recent version.

You may edit only the latest version; all other versions are read-only.

5.1   Accessing versions

To access versions:

1. Click **Functions > Properties > Versions** on the item. *See Figure 3-16. The Versions page appears. See Figure 3-17.*
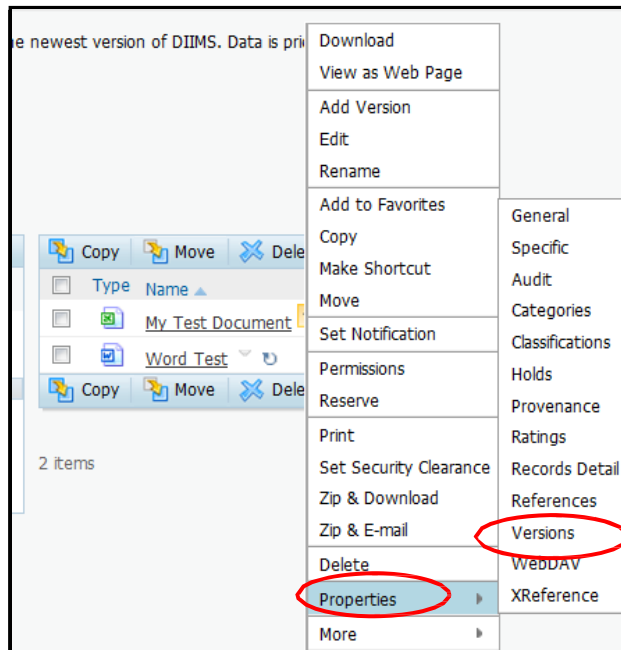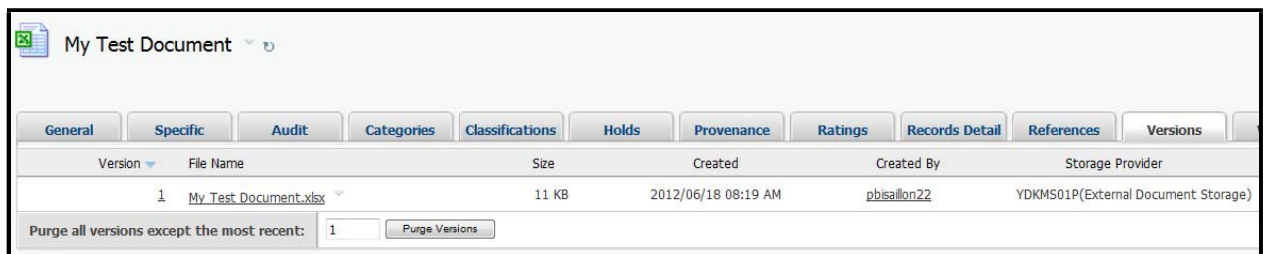

Figure 3-16: Access to the Versions page

Figure 3-17: The Versions page

6. Managing Versions

The document's versions **Functions** menu commands are:

Download and Open	Opens or downloads the selected version.
View as Web Page	Displays the version as a Web page.
Lock	Locks the version from deletion. Changes to Unlock function.
Print	Prints the document version.
Zip & Download	Zips and downloads the document version.
Delete	Deletes the specific version of the document. It cannot be retrieved. The Delete command is not available for locked documents or for documents referred to by a Generation. Users must have Delete Version permissions.
Properties > General	Displays the General tab. Lists document properties.
Properties > Specific	Allows users to limit the number of versions created which will keep only X number of the most recent versions.
Properties > Categories	Lists custom attributes for this version.
Properties > References	Lists Generations that refer to this document.

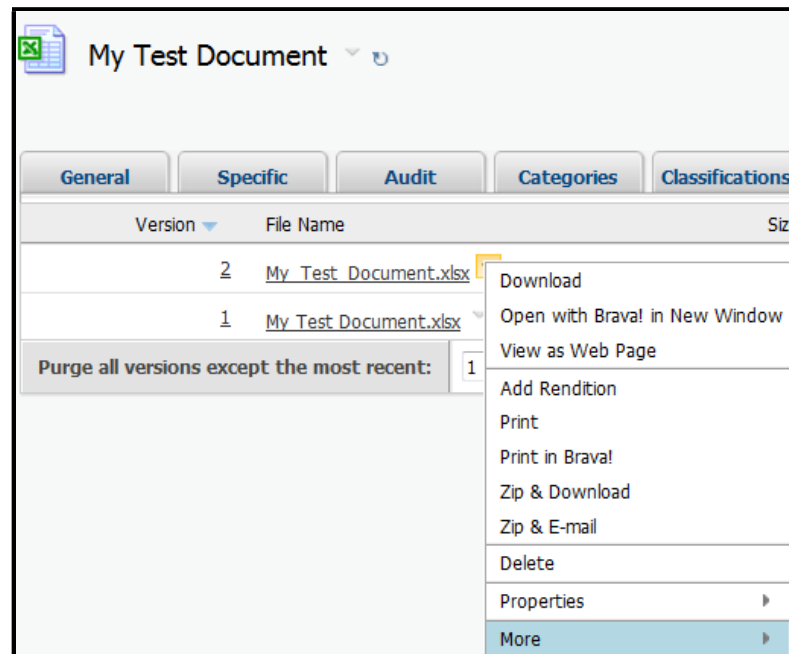*Table 3-2: Version Function Menu Commands*

Figure 3-18: Version Functions Menu
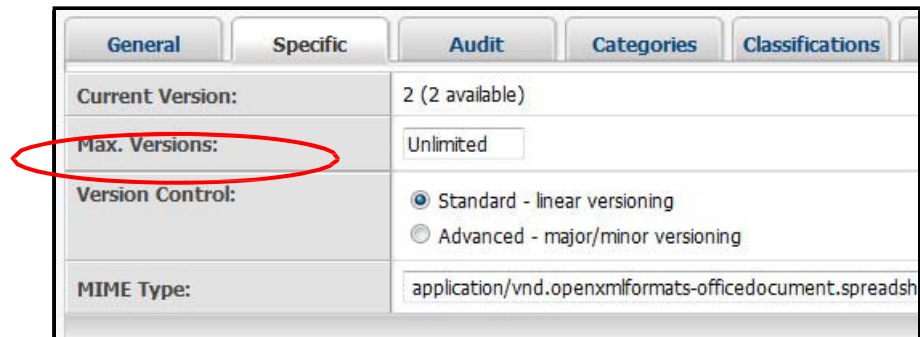
6.1 Limiting versions

By default, DIIMS stores an unlimited number of document versions. However, the System Administrator may set a system default. Users with **Delete Versions** permissions may override the system default and identify a limit to the number of versions they wish to retain per document.

When the maximum number is reached, DIIMS deletes the oldest version, unless that version is locked or has a Generation pointing to it.

Note: Generations make certain Versions of an item more visible and accessible. Like a Shortcut, a Generation points to a particular Version of an item, usually a previous Version. If you have an old Version of an item that is still needed, you can make a Generation against that Version and store it in any container or Workspace. This prevents the Version that it points to from being modified or deleted.

To limit versions:

1. Navigate to the document whose versions you want to limit.
2. Select **Functions > Properties > Specific**. *The document's **Properties** page opens with the **Specific** tab active.*
3. In the **Max. Versions** field, specify the number of versions you want to retain.
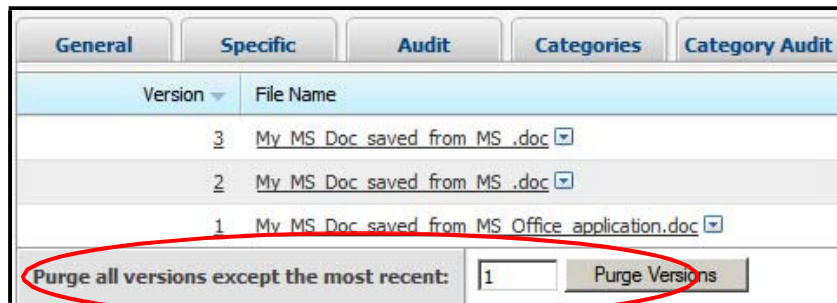4. Click **Update**.

Figure 3-19: Maximum Versions to keep

6.2 Removing Versions

DIIMS enables users with **Delete Version** permissions to delete several older versions simultaneously. Users may determine how many versions they need to keep by specifying the number in the **Versions** tab. All older versions are deleted unless they are locked or have a Generation pointing to them.

To delete older versions simultaneously:

1. Navigate to the document whose versions you want to delete.
2. Select **Functions > Properties > Versions**. *The Properties page opens and the Versions tab is active.*
3. In the **Purge all versions except the most recent** field, enter the number of versions you want to keep**.**
4. Click **Purge Versions.** *DIIMS displays a system message confirming the requested deletion.*
5. Click **OK**. *DIIMS saves the specified number of versions. It keeps all locked versions and versions that have Generations pointing to them*.

Figure 3-20: Purge older versions command

7. Generations

DIIMS enables you to manage a specific item version, such as a final version, by making it a Generation. It provides unique functions that enable you to manage it in the same way as you would a separate document, in that you may:

- track the final version within DIIMS, and identify it with a special icon ,
- lock the version to prevent further modification or deletion,
- store the Generation in a separate, specific location from the original, creating working folders (documents that are a work-in-progress), and published areas (final versions),
- modify the Generation name to reflect its context as final, and
- make the generation easily accessible, since it points to the Generation version and not the other versions.

To make a Generation:

1. Navigate to the document which you want to make a Generation.
2. Select **Functions > Make Generation.** *DIIMS opens the **Make Generation** page. The item field displays the document path.*

Figure 3-21: Make generation
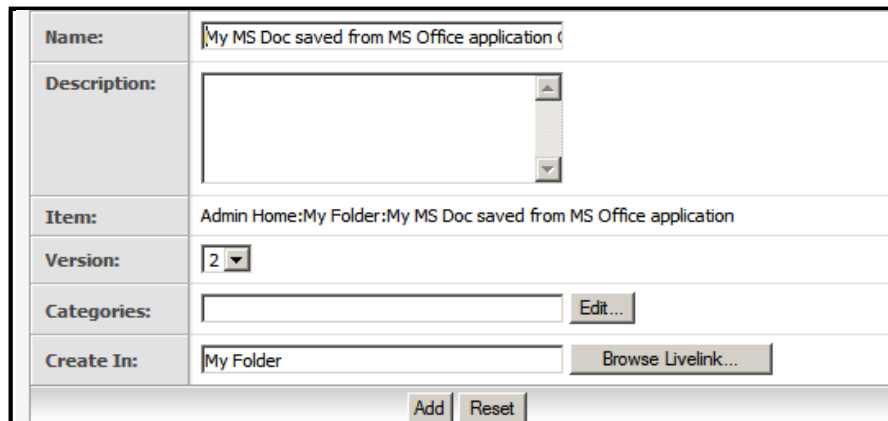
3. Complete the **Make Generation** page:

Name	You may enter a name that accurately reflects this particular version.
Version	Select the version you want to use as the Generation
Browse DIIMS	Select the location where you want to keep the Generation

4. Click **Add** to create the Generation.

8. Summary

In this module, you have learned to:

- Control access to information by applying permissions to the folders and documents;
- Modify the content of documents online and offline;
- Add versions of documents to DIIMS using several methods, depending whether they were edited online or offline;
- Reserve and unreserve documents to prevent others from editing documents;
- Manage versions from the version's Functions menu;
- Limit versions to a specific number;
- Delete several versions using the Purge command;
- Create generations

Module 4 Searching for Information

Locating and retrieving information quickly is essential. DIIMS provides several tools that enable users to search the Repository quickly for their information.

An advantage to saving information to the DIIMS Repository is the capability of using a search mechanism to query the Repository. This ability saves valuable time and facilitates the processing of work.

In this module, you will learn to:

- Use several search tools to locate and retrieve information
- Perform a **Quick Search**
- Apply wildcard characters to define searches
- Refine searches using slices, highlighting, themes and display options

1. Finding Information

When information is stored in the DIIMS Repository, DIIMS creates a full-text index: the DIIMS search engine gathers information, analyses it and then stores the data to facilitate accurate information retrieval.

When you 'generate' a search, the system performs an index search on:

- a document's textual content (dependent on the file type)
- discussion topics and replies, news items and tasks
- a document's metadata (the document descriptors or properties, such as the author's name, creation date, etc.).

2. Using the Search Bar

The fastest way to search for information is with the **Search** bar, located on the top right of most pages. The **Search** bar provides several tools to refine your search parameters. *See Table 4-1.*

Figure 4-1: The Search Bar

To search for information, you need to specify criteria (such as author, words and context) in the **Search** bar. Indexing information enables the system to identify and locate the documents that match the specified information. The information displays on the **Search Results** page. *See Figure 4-3.*

2.1 The Search Bar:

1	**Search Type**	Defines the type of search DIIMS performs. S*ee Table 5-2.*
2	**Select Search Item Type**	Refines the search by application type and objects/containers. *See Table 5-3.*
3	**Select modified time period**	Refines the search by date last modified.
4	**Select Search Slice**	Refines the search by location in the DIIMS Repository. S*ee Table 5-4.*
5	**Search text box**	Text field to enter specified criteria, such as keywords. Use operators to define the scope of the search. *See Table 5-5.*

Table 4-1: Search Bar Tools

2.1   The Select Search Type Filter

	Search Type	Action Result
1	**Search DIIMS for**	Locates all information containing the specified criteria, verifies users' permissions and displays results in the Search results page
2	**Search for a DIIMS Nickname**	Searches for items that have a nickname applied to them in the item's **Properties** page

Table 4-2: Default Search Types

2.2   The Select Search Item Type Filter

	Search Type	Action Result
1	⭐ ▾	Searches all items in DIIMS
2	**All Documents**	Searches all documents in DIIMS. Can be filtered by individual type: Excel, Word, PDF, Zip Archives, PowerPoint, Text
3	**Folders**	Searches Folders only
4	**Boxes**	Searches for physical Boxes
5	**Volumes**	Searches for physical Volumes
6	**Classifications**	Searches RM Classifications
4	**Media**	Searches all Media. Can be filtered by individual type: Jpegs, Gifs

Table 4-3: Search Item Types

2.3   The Select Search Location Type Filter

	Slice Name	Action Result
1	**From here**	Searches information contained within the slice (search section) and all inherent items
2	**From here (expanded)**	Retains the slice parameters and opens the **Advanced Search** page
4	**Enterprise**	Includes all information stored in the DIIMS Enterprise and in the user's personal workspace (latest versions)
5	**Enterprise (all Versions)**	Includes all information in the DIIMS Enterprise, user's personal workspace, and all of the item's versions (not limited to the most recent version)

Table 4-4: Search Location Type

2.4 The Search Text Field, Keywords and Operators Filter

	Search criteria operators	Search criteria keywords	Action Result
1	**Pipe (|)**	OR	Cmte OR committee Cmte | committee Finds all instances of 'cmte' *or* 'committee'
2	**Ampersand (&)**	AND	Group AND committee Group & committee Finds all instances of 'group' *and* 'committee'
3	**Quotes ('')**	Exact Phrase	"working group" Finds all instances of the exact phrase "working group"
4	**Asterisk (*)**	Wildcard	*committee Finds all instances that end in 'committee' group* Finds all instances that begin with 'group', e.g. groups, grouping
5	**Ampersand / exclamation (&!)**	And-Not	Committee AND-NOT meeting Committee &! Meeting Finds all instances of 'Committee' but not 'meeting'

Table 4-5: Search Operators and Keywords

3. Performing a Quick Search

To generate a search:

1. Navigate to the location where you would like to begin your search.
2. From the **Default Search Types,** click the **Search DIIMS for** drop-down list. *The drop-down list displays three types upon which you can focus your search. See Figure 4-2 and Table 4-2.*

Figure 4-2: the Search Bar

3. In the **Select Searchable Type** (application) drop-down list, select **All documents**. *See Table 4-3.*
4. In the **Select Time Modification Period,** select **Anytime**.
5. In the **Select Search Type** (slice), select **From Here**. *See Table 4-4.*
6. Enter your search criteria, either a word or a string of words. *See Table 4-5.*
7. Click **Go** or **Enter** (on your keyboard). *The results appear in the **Search Results** page. Only those items that you have permission to view display in the Search Results page. See Figure 4-3.*
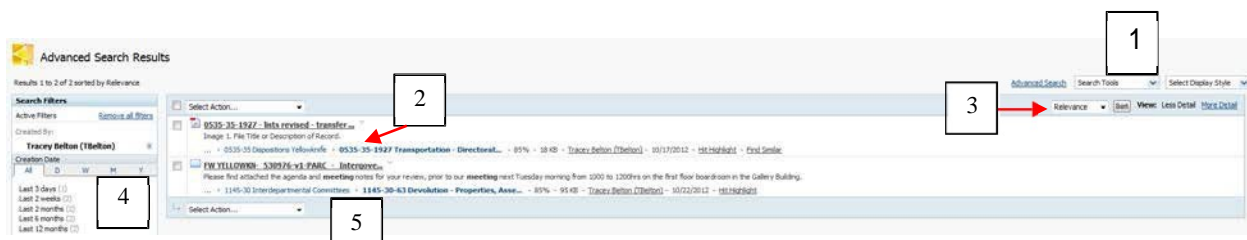

Figure 4-3: The Search Result window

4. Viewing the Search Result Page

To locate the information, the **Search Results** page organizes the search results in several groups:
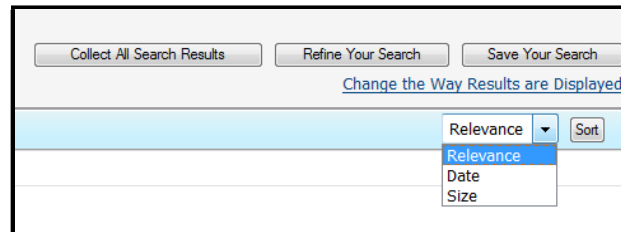

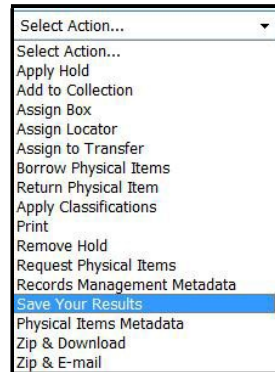*Figure 4-4: The Search Results Sort Options*

Figure 4-5: The Select Action Options

4.1 The Select Search Location Type Filter (*See Figure 4-4*)

1. Search page sorting options *See Figure 4-4*	
Collect All Search Results	Enables you to add search results to your collections
Refine Your Search	Enables you to redefine your search criteria. It redisplays the search criteria in the **Search** page for edit and resubmission
Save Your Search	Saves the search criteria as a search query (🔍) for future use
Change the Way Results are Displayed	Opens the **Display Options** page to configure the display options for the **Search Result** page
2. Select Action menu *See Figure 4-5*	
Add to Collection	Adds selected search results to a collection
Save Your Results	Selects the results that you would like to save and store as a **Search Result Snapshot (🖼)**
3. Sort options *See Figure 4-4*	
Relevance	Lists the results according to the percentage indicating the significance of the item to your search criteria
Date	Lists the results by date
Size	Lists the results by size

4. Search Filter Options *See Figure 4-3*	
Creation Date	Filters the search results based on the date that an item was created
Modification Date	Filters the search results based on the date that the item was last modified
Created By	Filters the search results based on the person who created the item
Content Type	Filters the search results based on the item type
File Type	Filters the search results based on the file format
Email From	Filters the search results based on the from field of an e-mail
Email To	Filters the search results based on the to field of an e-mail
Size	Filters the search results based on the file size

Table 4-6: Search Options

| 5. Search page Elements	Action
Score	Indicates the relevance of an item (relative to the specified search criteria)
Type	Identifies the file format
Name	Displays the item name
Date	Displays the date that the document was last modified
Size	Displays the file size
Location	Displays the location of the document in breadcrumb trail. (Displays a series of sequential links so that users can see where the current page or item is located within the site)
Summary	Generates a synopsis of the document's content, based on its location, the surrounding structures of the document and the statistical significance of the words
Function	Functions menu displays the actions that may be performed on this item

Table 4-7: Search Results page components

5. Personalizing the Search Page Display

DIIMS enables users to personalize the way the **Search Page** appears on their computer.

To modify the Search Page display:

1. From the **Search Result** page, click the drop down "Select Display Style" located above the right-hand corner of the Search Results. Then click **Edit the Display Options**. *The **Search Page Display Options** page appears.*
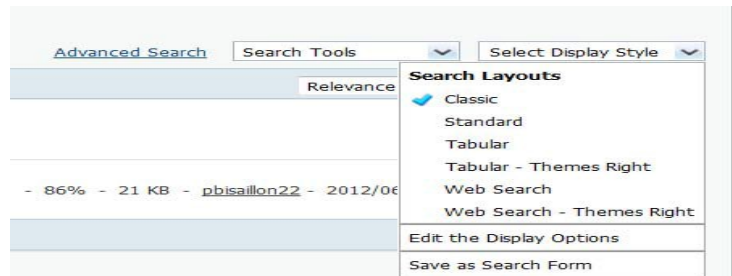
1. Click in the **Style** window to modify the appearance of the display. *See Table 4-8.The **Preview** pane displays a preview of the style.*

2. Select **Number of Results** to modify the number of result listings.

3. Select **Summaries** and **Descriptions** to view either or both.

4. In the **Results Fields**, **Add** or **Remove** to view the fields you wish to see displayed on your **Search Result** page.

Figure 4-6: The Search Page Display Options page

Results Page Layout - Style	
Style	**Action**
My Preferred Style	Displays the current style that is set for the **Search Results** page
Classic	The **Search Results** page includes Description, percentage of relevancy, Hit Highlights, and storage location within the repository
Standard	The **Search Results** page includes Description, links to activate the Hit Highlighting and Find Similar functions, a More Info and Less Info option that displays the view of the Score, Location and summary Information
Tabular	The **Search Results** page displays in well-defined columns like a spreadsheet
Web Search	The **Search Results** page displays similarly to a regular Web Search. The **Themes** pane displays on the right of the page
Preview	Displays a preview page of each style
Number of Results	Provides options to limit the number of results that appear per page
Show Summaries/Description	Provides a dropdown list of options to display summaries and/or options
Show Key Phrases	On/Off option to display keywords in the document
Result Fields	Option to display Result fields, includes number, score, MIME type, Name, Date, Size, and storage location within the repository
Sort By	Sort by Relevance, Date, or Size

Table 4-7: Page Result

Style	Action
My Preferred Style	Displays the current style that is set for the **Search Results** page
Classic	The **Search Results** page includes Description, percentage of relevancy, Hit Highlights, and storage location within the repository
Standard	The **Search Results** page includes Description, links to activate the Hit Highlighting and Find Similar functions, a More Info and Less Info option that displays the view of the Score, Location and summary Information
Tabular	The **Search Results** page displays in well-defined columns like a spreadsheet
Web Search	The **Search Results** page displays similarly to a regular Web Search. The **Themes** pane displays on the right of the page
Preview	Displays a preview page of each style
Number of Results	Provides options to limit the number of results that appear per page
Show Summaries/Description	Provides a dropdown list of options to display summaries and/or options

6. Saving your Search Results

6.1 Saving your Searches as Queries

Once you have located the information you were seeking, you can save the specified criteria and store it in a folder for future use. DIIMS saves this search as a query, which can be re-used by you and any colleagues who have permission. Each time you click on the query, a new search is generated based on the saved criteria; an updated search result is provided.

To save a search as a query:

1. Generate a search.
2. In the **Search Results** page, click **Save Search Query**. *See Figure 4-3, item #1. The **Save Search Query** page appears.*
3. If the search did not return the results you were seeking, click **"Advanced Search"** *See Section 8 Advanced Searches – Using Full Text Search Options.*
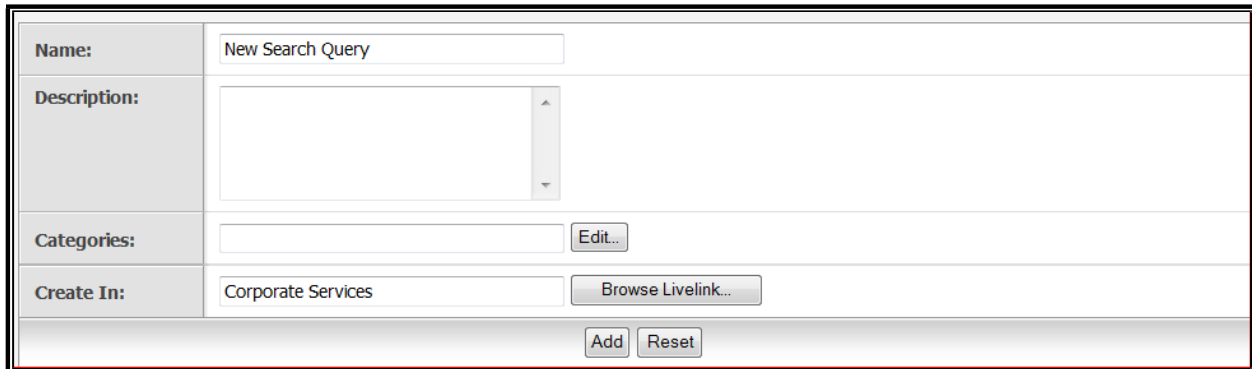
Figure 4-8: Save Search Query Page

4. Complete the **Save Search Query** page:

Name	Enter a descriptive name
Description	Enter a concise description of the query
Categories	Add a category if one has been created
Create In	Click **Browse Content Server**… to select a container for the query

5. Click **Add.** *The query appears in the folder. See Figure 4-8. It also appears in the **My Queries** tab of My **Reports**. See Figure 4-9.*
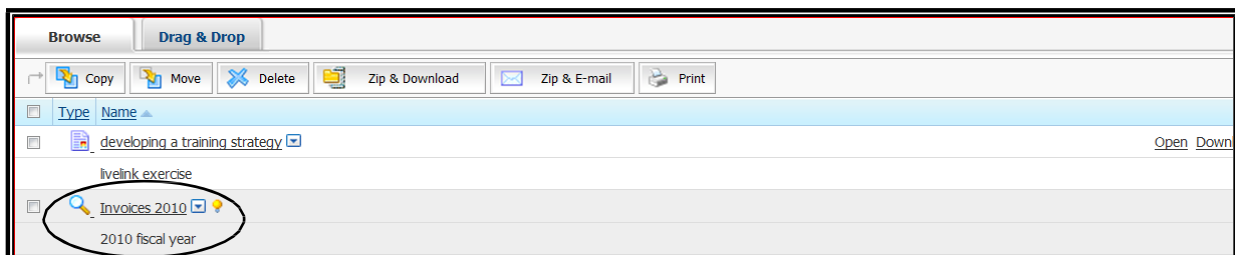

Figure 4-9 The Query
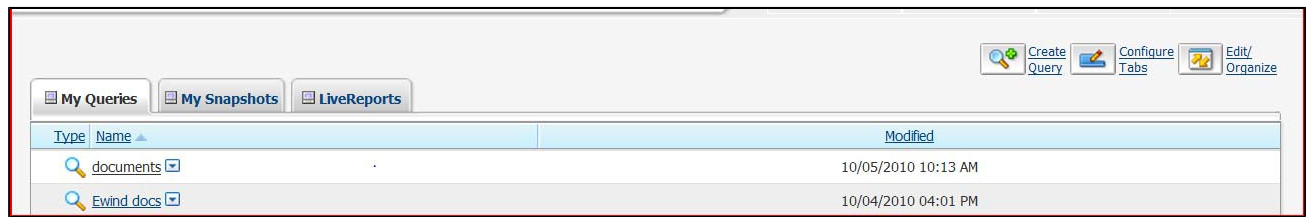
Figure 4-10: My Query in My Reports

6.2 Saving Snapshots

To create and save a snapshot:

1. Generate a search.
2. On the **Search Result**s page, select the **Include** check box beside each search results you want to add to the snapshot.
3. From the **Select Action** dropdown list, select **Save Your Results.** *The Save your Snapshot page opens.*
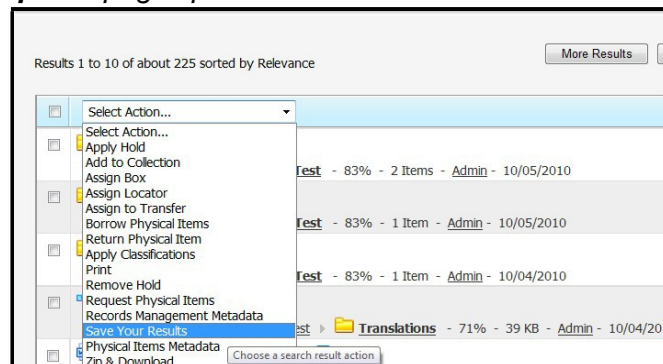

Figure 4-11: Save your Results command

Figure 4-12: New Search Result Snapshot - Save

4. Save the **Snapshot.**
5. Specify the name and location.
6. Click **Add.** *The snapshot is saved to your **My Snapshots**.*
7. To view the snapshot, navigate to the location where it is saved, such as **My Snapshots** in My **Reports**, and click on the link to open it.

7. Advanced Searches

If the **Quick Search** does not provide sufficient options to define the search criteria and scope, the **Advanced Search** tool provides further choices to broaden or narrow the search parameters.

The Advanced Search tab displays a list of search filters grouped by information types (metadata), which facilitates the specification of criteria.

An Advanced search can include as many search filters as necessary to define the parameters of the search, e.g. use the Text Filter to define content, and the System Attributes to define the author's name.

8. Performing Advanced Searches

8.1 Using Full Text Search Options

To perform an Advanced Search using Full Text search options:

1. Click on the **drop down arrow, and then select the Advanced Search** link in the **Search** bar. *See Figure 4-13. The Advanced Search page opens. See Figure 4-14.*
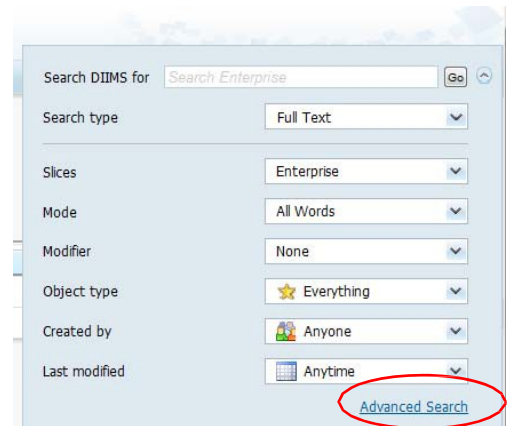
Figure 4-14: The Advanced Search link

Figure 4-15: The Advanced Search page

2. In the **Full Text** window, select one of the options:

Full Text Option	Action
Look For	Lists range of words and phrases
Modifiers	
Related to	Words derived from the main part of the specified word: could, can
Sounds Like	Words sound like the specified term: sail, sale
Synonyms of	Words from the thesaurus entry for the specified term: stone, pit, seed, kernel
Word begins/ends with	Words that begin or end with the specified term: Working group, Social group, safety group.
Within	
All	Searches in both the content and metadata of item
Content	Searches only in the content of item
Metadata	Searches only in the metadata

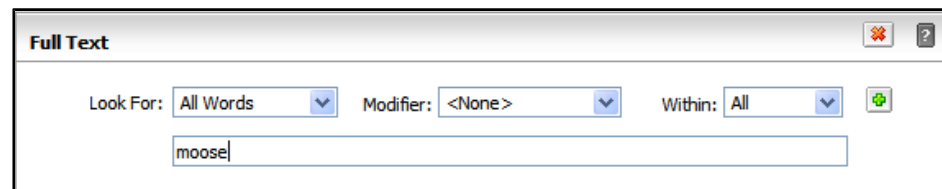3. Enter search criteria and Click **Search**, or

Figure 4-16: The Full Text dialogue box

4. Continue to define the advanced search criteria with the **Advanced Options** in the left pane. (Continue to 8.2 System Attributes)

8.2 System Attributes

System attributes are item data (properties), such as user information and date information, which are automatically collected and tracked by DIIMS. You can use these metadata to define your search parameters.

To search on system attributes:

1. In the **Advanced Search** page, select the **System Attributes** option (in the left pane). *DIIMS displays the **System Attributes** page.*

Figure 4-17: The Attributes page

2. In the **Object Type** dropdown list, select an item. *See Note.*

3. From the **Created By** field, click **Find User** . *The **Select a User** window appears.*

4. Enter the user name of the author.

> **Note**
>
> *When you need to identify more than one value in a filter, click the sign to the right of the value field.*

5. Click on the **plus and minus signs** to add further attributes to the search options.

6. Click **Search** to generate the search.

8.3 Searching on Categories

When saving corporate information to DIIMS, business users have the opportunity to apply categories and attributes to the information; this facilitates defining the search parameters to identify and retrieve information.

To search on Categories and Custom attributes:

1. In the **Advanced Search** page, select the **Categories** filter (in the left pane). *DIIMS displays the* ***Categories*** *page.*
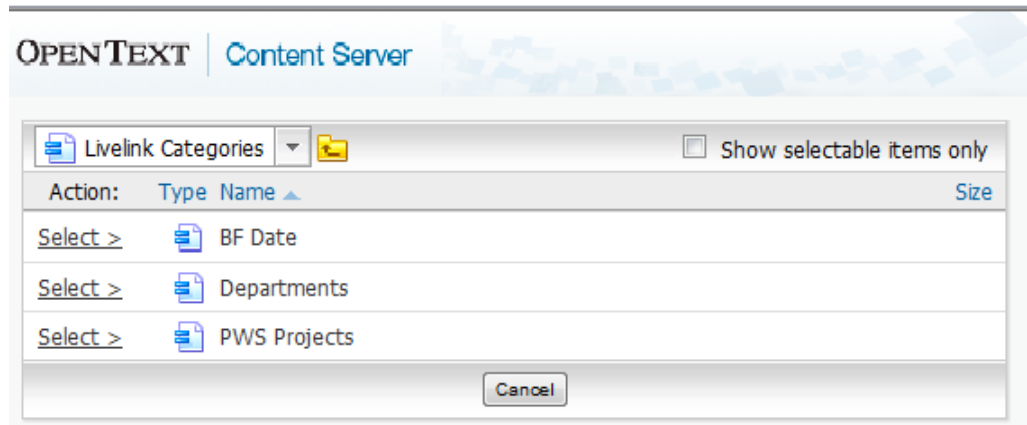
Figure 4-18: The Attributes page

2. Click **Select** on the category you want to search. *The category filter appears in the Search pane. The attributes attached to the category display within the Category pane...*
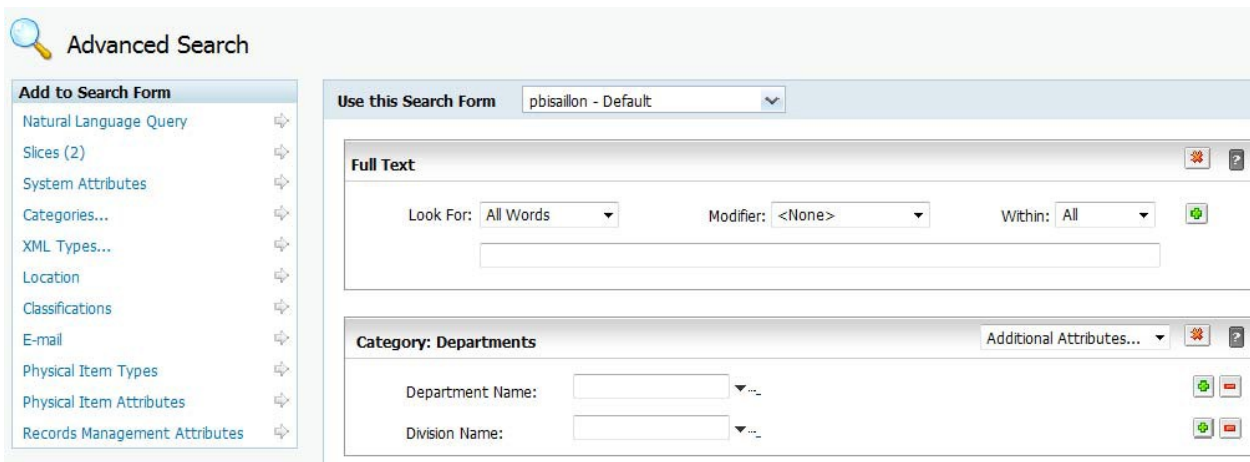

Figure 4-19: The Attributes page

3. Select the attributes for the search parameters. Click the ⊕ to add or ⊖ to remove attributes values for each attribute.

4. Click **Search**. *The Search Results Page displays the list of results.*

8.4 Creating Virtual Folders

Virtual folders allow you to store shortcuts to items in DIIMS. These shortcuts enable you to quickly and easily access the original Content Server items. Unlike collections, virtual folders are dynamic and are always updated with current information.

Virtual Folders can be saved with Content Filters items enabled to create a custom view to the shortcut saved in DIIMS. Content Filter will display information grouped by facets to allow for quicker retrieval of information.

To enable Content Filter facets (From Web interface only):

1. Launch the GNWT- DIIMS web site

2. Navigate through the Enterprise Workspace folder structure to the folder that contains the information you want filter using Content Filters.

3. Select one or more filters from the Content Filter pane located on the left of the item contents by **Left-Clicking** the filter name
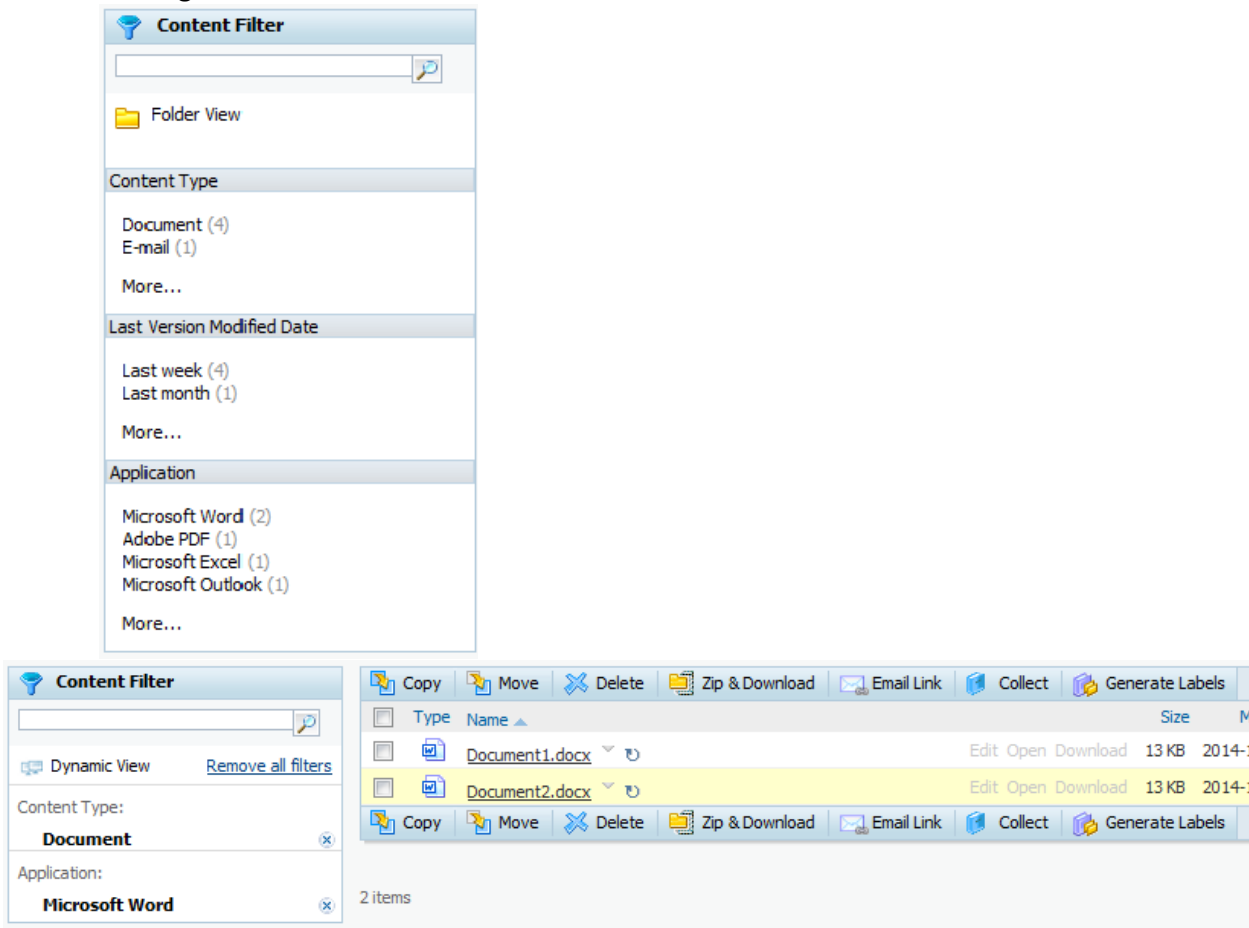

Figure 4-20: The Virtual folder results page showing only Word documents as selected under Content filter on the left pane

8.5 Summary

In this module, you have learned that DIIMS provides many tools to retrieve information quickly from the database by:

- performing a **Quick Search** using the **Search** bar
- using the search filter tools to refine the scope of a search by system attributes: application, date, location and keywords
- viewing the search results and modifying the display of the search results
- saving searches as queries for future re-use
- using **Hit Highlight** and **Themes** to locate information readily within the found items
- performing an **Advanced Search** to refine further the scope of the search with Full text, custom attributes, classifications, directories, scope, and Natural Language Query

5

Module 5 Customizing DIIMS

You may adapt the DIIMS settings to meet your personal requirements, such as organizing information to which you refer frequently and configuring your personal DIIMS environment by means of the **Personal** menu.

In this module, you will learn to:

- Manage your Personal Workspace
- Create Favourites and Collections
- Add Shortcuts and URLs hyperlinks
- Organize your personal pages using tabs
- Configure your personal settings
- Edit your DIIMS user profile

1. Getting to Know your Personal Workspace

My Workspace contains the items you have saved for your personal use. However, the more you use it to store your frequently accessed items, the longer the list becomes. To facilitate the retrieval of your information, the **Personal** menu organizes your corporate information saved into My Workspace by using filters on specific items.

The **Personal** menu enables you to organize corporate information according to your personal requirements. It groups information into categories for easy access and retrieval.

You may also configure how DIIMS displays information in your personal DIIMS user-environment, and define personal contact information that can be seen by other DIIMS users.
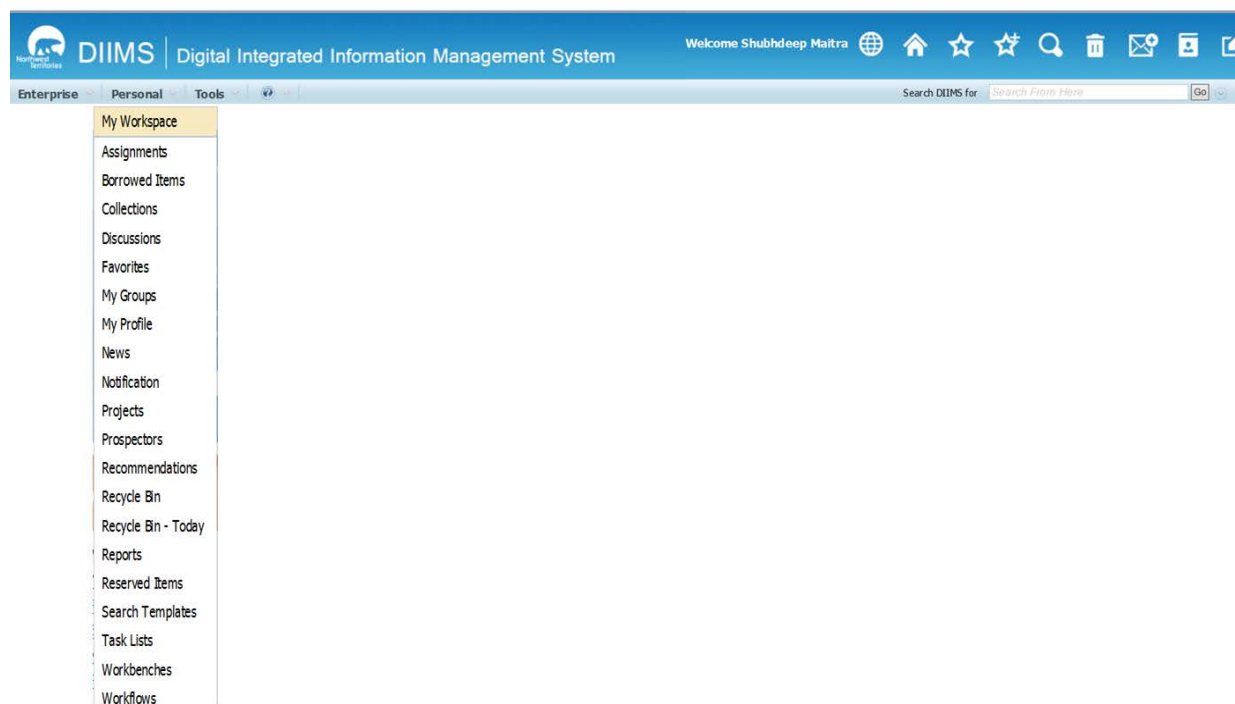

Table 5-1: Personal drop-down menu

From the **Personal** menu, you can view:

Menu Item	Purpose
My Workspace	Lists collections of items to which you frequently refer
Assignments	Lists your workflow assignments and tasks
Borrowed Items	Lists the physical items that are charged out to you (i.e.: Volumes, Boxes)
Collections	Displays a list of shortcuts to DIIMS items to which you frequently refer
Discussions	Lists the discussions you have permission to see
Favorites	Lists the items you have identified as frequently used
My Groups	Lists the groups of which you are a member
My Profile	Displays your user contact information and other information you wish to supply
News	Lists the news channels to which you have access
Notification	Lists the notification reports and configuration options
Projects	Lists the projects in which you are involved
Prospectors	Displays all prospectors you have saved to My Workspace
Recommendations	Lists items or users the system has identified as of interest to you
Recycle Bin	List items that have been deleted but still in the recycle bin. Items in the recycling bin are purged after 7 days
Recycle Bin - Today	List items that have been deleted today but still in the recycle bin. Items in the recycling bin are purged after 7 days
Reports	Lists LiveReports, queries and snapshots saved to My Workspace
Reserved Items	Lists the items reserved to you or to one of the groups of which you are a member
Search Templates	Lists your search templates
Task Lists	Lists the task lists that you have permission to see
Workflows	Lists the workflow tasks assigned to you and all workflows that you initiated or manage

Table 5-1: Personal Workspace Items

2. Managing your Personal Workspace

My Workspace is your personal area in which you can save information for your personal use and for quick retrieval. It can also be used to save items that you do not want to share with your colleagues.

Only you and the System Administrator may access items saved to your personal workspace.

To access My Workspace:

1. From the **Global** menu, select **Personal > My Workspace** or **My Workspace** from the sub-menu of commonly-used items. *My Workspace displays all items saved to My Workspace.*
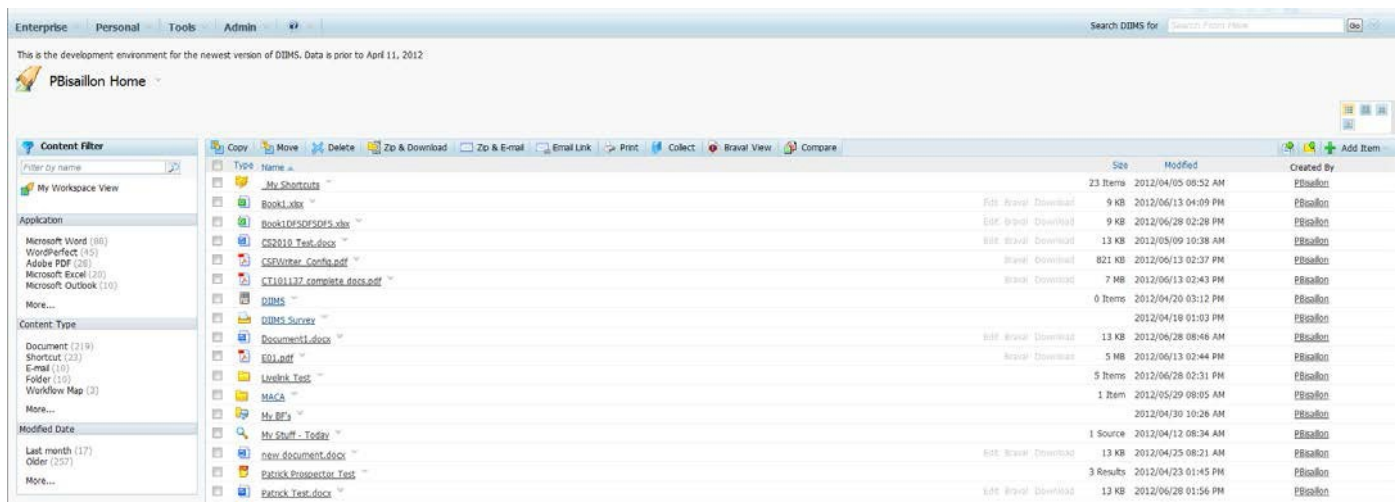

Figure 5-2: My Workspace – Web Interface

The Corporate EIM Section has set a standard 100MB quota limit on the personal workspace for all employees. The current average of employees using the personal workspace is 45MB's. Based on industry trends with other similar sized organizations using an EDRMS system such as DIIMS, the average "personal" quota sizes is set to 100MB's.

The 100MB limit will most certainly be sufficient to allow employees to save non-business related information within DIIMS along with other items to personalize DIIMS. There are no retention & disposition rules applied to items within the personal workspace, and the items are not accessible or shareable for business related reasons. Employees must save all business related information to the appropriate departmental folders within the Enterprise Workspace.

The personal workspaces will be monitored on an ongoing basis to ensure that GNWT records are being stored in an accessible location. (Enterprise Workspace)

Personal Workspace Item Examples:

- DIIMS Shortcuts
- Collections
- Saved Searches

- Virtual Folders
- Non Business Related Documents
  - Resumes
  - Performance Appraisals
  - Hockey Pool
- Non Business Related Emails

When a user's personal workspace has reached 95% capacity, DIIMS will send a notification email to the employee with a detailed report of their personal workspace usage. Employees will continue to get a daily notification until the personal workspace is below 95%.

When a user has reached the 100MB quota limit, DIIMS will send the employee a notification email with a detailed report of their personal workspace usage, and the employee will not be able to save any new items to their personal workspace until they are below the 100MB quota.

How do I manage my Quota?
- All business value records should be stored in the appropriate departmental folders within the Enterprise Workspace so they are shareable and accessible within your department.
  - Your Departmental Records Coordinator can assist you with moving your information into the appropriate departmental folders within the Enterprise Workspace
- Non Business related information that has no value can be deleted from DIIMS to free up space
- The DIIMS Service Desk or your Departmental Records Coordinator can assist you in setting up "favourites" to departmental folders within the Enterprise Workspace.

How can I monitor my usage?
- Employees can run the following report to monitor their personal workspace usage:
DIIMS Personal Workspace Quota

3. Creating Favorites

The **Favorites** tool is another way to organize information you use frequently. The advantage to using the **Favorites** tool is the ability to organize your Favorites by groups, which are arranged by tabs.

To add an item to your Favorites:

1. From any page in DIIMS, click the item's function menu, and select **Add to Favorites.** *The item is added to* ***Favorites.***
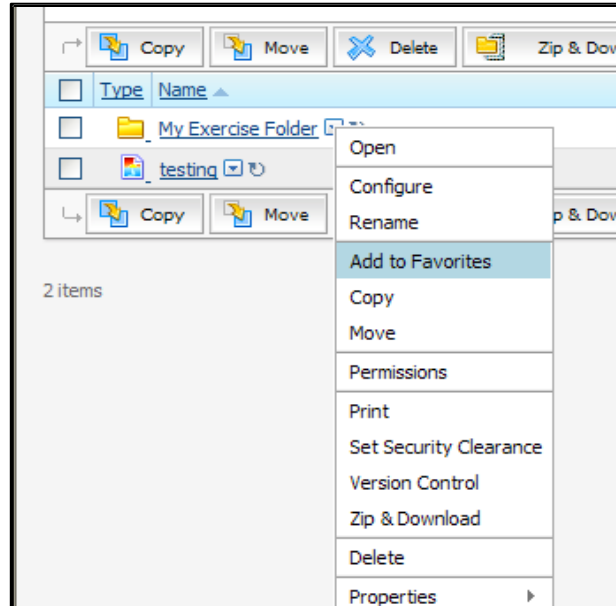

Figure 5-3: Add to Favorites – Web Interface

To view your Favorites

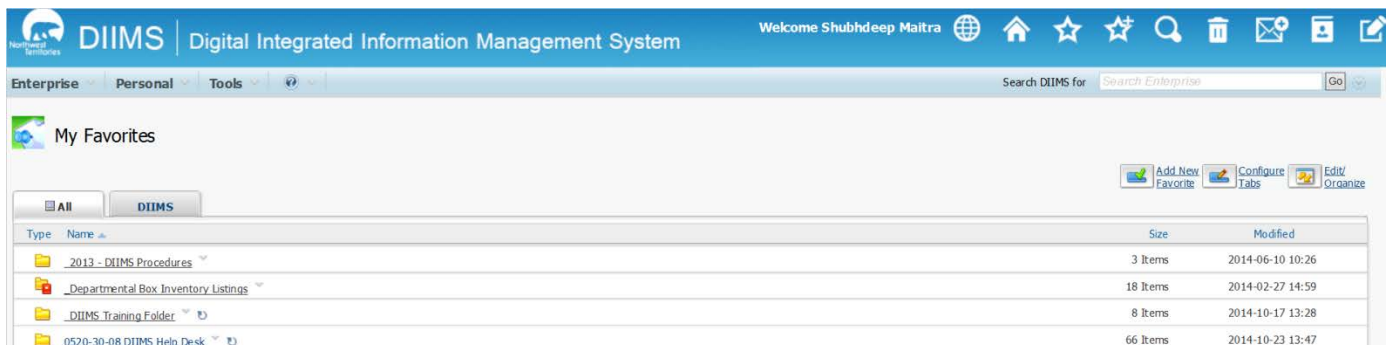1. Select **Personal > Favorites.** *DIIMS lists the items you have identified as Favorites.*

Figure 5-4: My Favorites page – Web interface

4. Creating Collections

Collections allow you to group shortcuts to items in DIIMS. These shortcuts enable you to quickly and easily access the original Content Server items. Collections also allow you to perform bulk operations on collected items. You can collect items from the Workspace or from search results.

You may also identify collections as **My Favorite** collection for quick access.

To create a Collection (From Web interface only):

1. Launch the GNWT- DIIMS web site
2. Create a search.
3. From the search results page, select the items you wish to add to your collection.
4. Select **Add to Collection** from the **Select Action** dropdown list. *See Figure 5-5.*
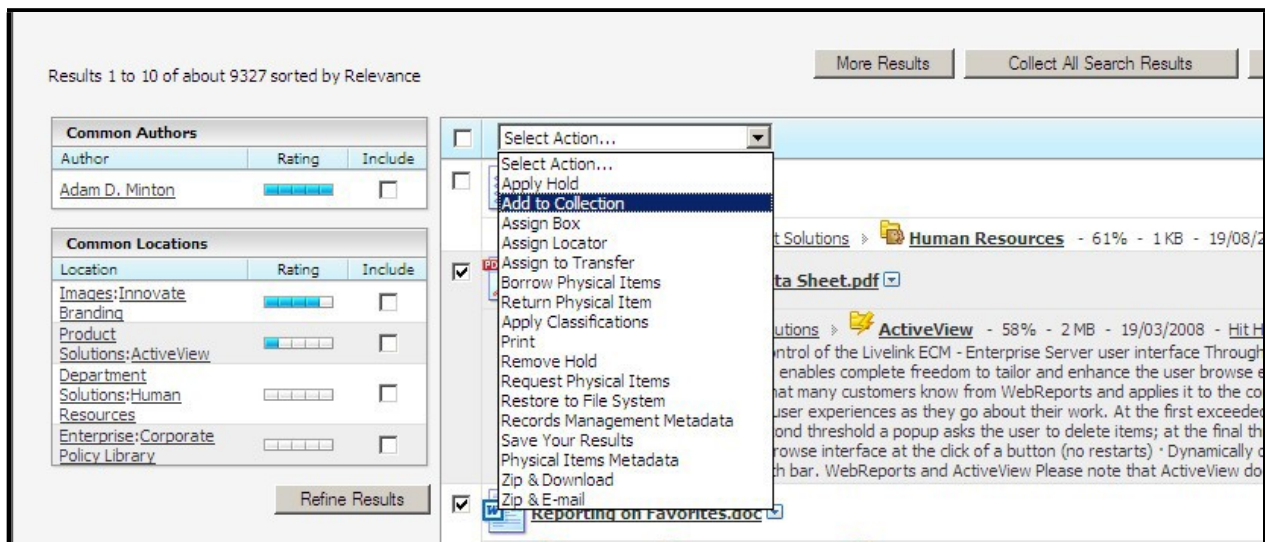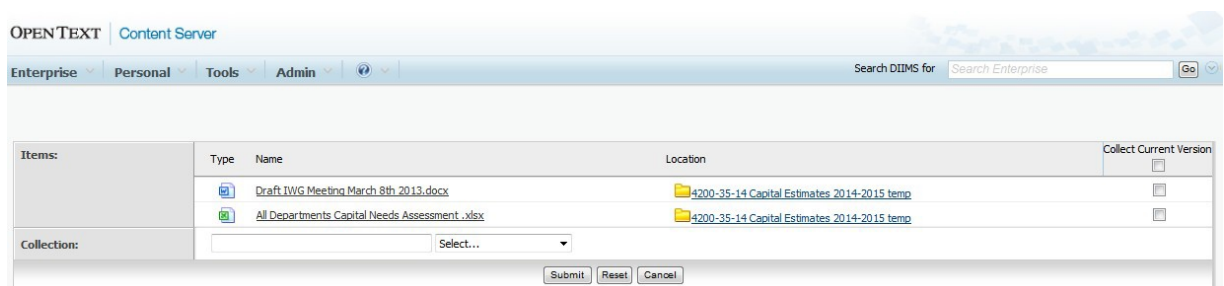

Figure 5-5: Add to Collections

5. Select destination collection: **Browse Collections** to locate the Collection you want to access, or **Create New Collection**, or use **My Favorite Collections** which will list any collections listed in your Favorites.

6. Click **Submit**>**OK**. *The items appear in your Collections from the Web and Enterprise Connect interface*
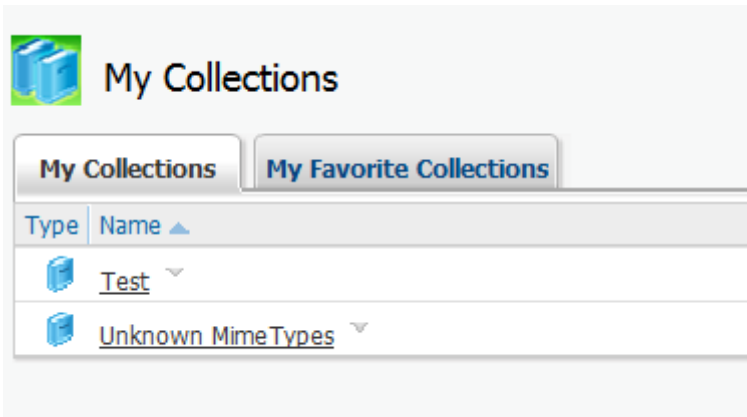

Figure 5-6: Collections Tab – Web Interface

5. Creating Virtual Folders

Virtual folders allow you to store shortcuts to items in DIIMS. These shortcuts enable you to quickly and easily access the original Content Server items. Unlike collections, virtual folders are dynamic and are always updated with current information.

To create a Virtual Folder (From Web interface only):

1. Launch the GNWT- DIIMS web site
2. Navigate through the Enterprise Workspace folder structure to the folder that contains the information you want to save as a virtual folder.
3. Select one or more filters for the folder.
4. Select **Save as Virtual Folder** from the Dynamic View bar above the contents pane.
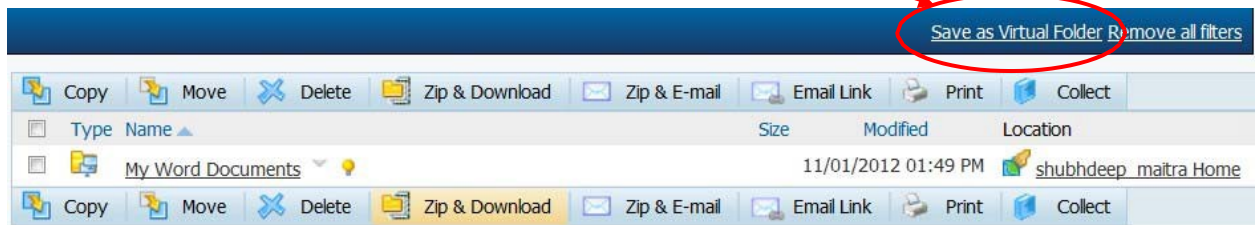

Figure 5-7: Save as Virtual Folder

5. Name your virtual folder. Change the Create In location to your personal workspace.

Figure 5-8: Add Virtual Folder

6. Click Add.

6. Creating Shortcuts

Shortcuts are hyperlinks to an original item that, when moved to another location, will still point to it. See DIIMS Tip #02

Shortcuts provide many advantages:

- Easy access to items located in the DIIMS repository,
- Many multiple shortcuts pointing to the same item can exist,
- Automatically opens the most recent version of the document.

To add a shortcut:

1. Click on the **Functions** menu for an item for which you want to create a shortcut, and select **Make Shortcut.**
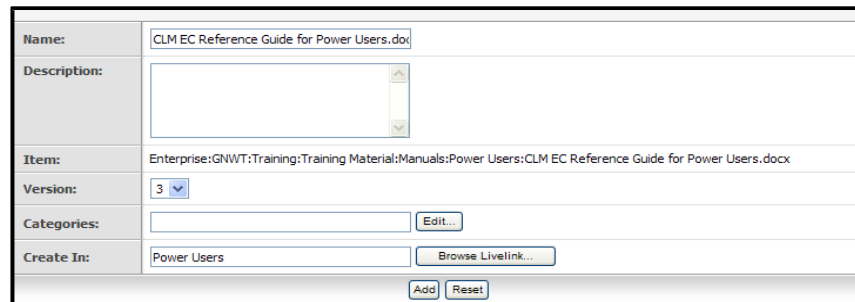

Figure 5-9: Add Shortcut page

2. Verify the information in the field:

Name	Displays the name of the item
Description	Displays information pertaining to the item
Item	Displays the item's path; if it is blank, click **Browse DIIMS**> select **Shortcut Item**> navigate to the item, and click **Select**
Categories	Enter a category if one has been defined
Create In	Displays the folder path in which the shortcut resides. Shortcuts should be saved within your personal workspace for easy access

3. Click **Add**. *The new shortcut is added to the selected location. A shortcut icon appears beside the item name.*
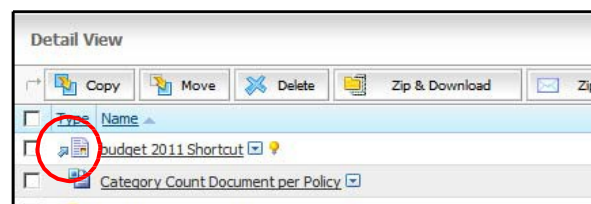

Figure 5-10: Shortcut icon beside the item name

7. Short Links

Short Links are short URL links to items *within* the DIIMS Repository. The link automatically opens the most recent version of the document. Any modifications made to the item by users who have **Modify** permissions will be seen.
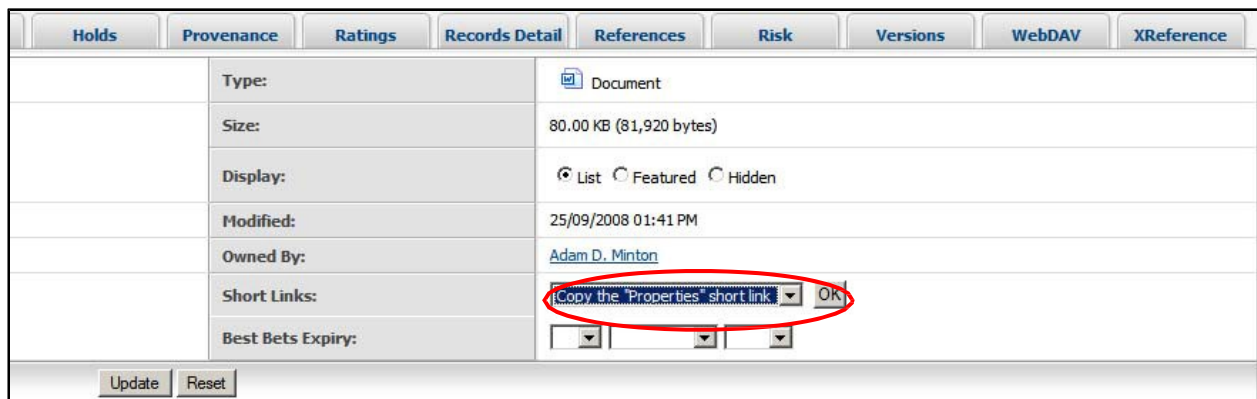
Short Links are used to e-mail a link to a DIIMS item or to copy a link to the item into documents or e-mails. Short Links provide direct access to the item without the extra characters and path information normally found in the Internet Explorer address bar.
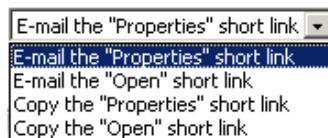
A short link appears as:Ex:http://diims.pws.gov.nt.ca/gnwt/livelink.exe/open/122662

To create a Short Link:

1. Locate the item for which you want to create a Short Link.
2. Select the **Functions**>**Properties**>**General** tab.
3. Select an option in the **Short Links** drop down list.
4. Click **OK**.

Figure 5-11: Short Links drop-down menu

Short Link	Action
E-mail the "Properties" short link	Opens a new e-mail message, with the name of the item as the subject heading. The system inserts a message in the e-mail body: e.g. DIIMS Item Name can be accessed via the following link: http://diims.pws.gov.nt.ca/gnwt/livelink.exe/open/122662.. Opens the document's **General** page.
E-mail the "Open" short link	Opens a new e-mail message, with the name of the item as the subject heading. The system inserts a message in the e-mail body:e.g. DIIMS Item 'Name' can be accessed via the following link: http://diims.pws.gov.nt.ca/gnwt/livelink.exe/open/122662. Opens the document.

Copy the "Properties" short link	Displays the following window and opens the **General** page.
Copy the "Open" short link	As above.
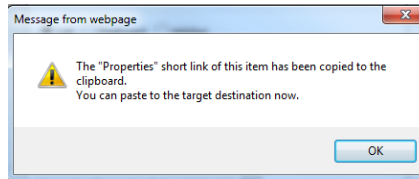
8. URLs

You may also create URLs to Web pages in DIIMS.

To create a URL:

5. Navigate to the folder where you would like to keep the URL.
6. From the **Add Item** bar, select **URL**. *DIIMS opens the URL page.*

Figure 5-12: Add URL

7. Complete the **Add URL** page

Name	Enter the name of the URL
URL	Enter the URL address
Create In	Verify that this location is where you want to create the URL item

8. Click **Add** to add the URL pointer.

9. Configuring your Personal Settings

The Settings function in the **Tools** menu enables you to modify how you work within DIIMS; you may modify how the page displays information and navigates and change the page color.

Tabs	function
General	
Default Start Page	Controls which page appears when you log in: *Enterprise Workspace, My Workspace* or *About Content Server*
Show Item Description on Detail View	Check to display item description on detail view by default
Navigation style	Choose hyperlinked or drop-down list
'New' Indicator Duration	Choose the number of days you want the *New* indicator to appear beside the item
'Modified' Indicator Duration	Choose the number of days you want the *Modified* indicator to appear beside the item
Enhanced Keyboard Accessibility Mode	Enables keyboard functionality and disables Java-dependent commands
Sidebar Location	Enables positioning the sidebar to the left or right of the main page
Show Sidebar in Browse	Enables viewing sidebar which contains content filters for search
Metadata Language	Controlled by the system
Colour	
Row	Defines alternating rows in different colours
Discussion	
Default Period From	Displays the time period for discussions to appear
Default View	Choose either *Nested* or *Report* view
Filter Preference	Choose *Topics only, Unread only* or *All*
Posting Preference	Toggle from *Use Content Summary as Subject*
Reply Preference	Toggle from *Quote Comments*
View Item Options	Toggle from *Show Threads in Context*
Workflow	
Workflow Assignments	**Starting Page**: select *General* or *Overview* **Proxy** : assign a person who will assume your tasks when you are away from the office **Show**: configure which assignments to display **Options**: choose *Include workflow assignments on "My Assignments" page* or *Automatically open the next assignment in the same workflow if assigned to me*
Workflow Statuses	**Show:** Choose *All, Initiated* or *Managed* **Sort Order:** select display order
Default "My Workflows" Tab	Choose *Assignments* (recommended) or statuses
Maximum Items Per Page	Choose the number of workflows to display per page
Password – Unused. Authentication is done through Active Directory	
Records Management – Records Management Use Only	
Physical Objects - Records Management Use Only	

Figure 5-13: Settings page

10. Summary

In this chapter, you learned to:

- Use the **Personal** menu to access items saved to **My Workspace**
- Save items to **My Workspace**
- Create **Favorites**, **Collections**, and add items to **My Favorites**
- Create **Shortcuts, Short Links,** and **URLs**
- Create and browse personal collections
- Personalize your Personal Settings.

Module 6 Windows Explorer and Outlook Interface

You may access folders, documents emails and other data items in DIIMS using the familiar Windows explorer interface and Outlook interface. The data displayed is exactly the same as the web interface. Majority of the functionalities are identical to that of the web interface with exception of content filters which is not displayed in Windows or Outlook interface.

In this module, you will learn to:
- Launch DIIMS
- Navigate the Enterprise Workspace
- Access information in the DIIMS repository
- Access documents and emails
- Add, move / copy folders, documents and emails
- Access information using the outlook interface of DIIMS

1. Logging into the DIIMS Interface - Windows Explorer

DIIMS users can easily access their corporate information from the existing corporate repositories (to which they have permission to access), and business applications, drag and drop objects between folders and directories, and apply metadata and records classifications to objects.

The Windows Explorer view displays an extra folder, DIIMS. This is the DIIMS corporate repository. Expand the folder to view and access the corporate folder structure. The interface behaves in the same manner as the network-shared directories. Launching the DIIMS interface is the same as accessing a folder in your network folder structure.

1. From your desktop, double click the DIIMS icon: . *The DIIMS window appears.*
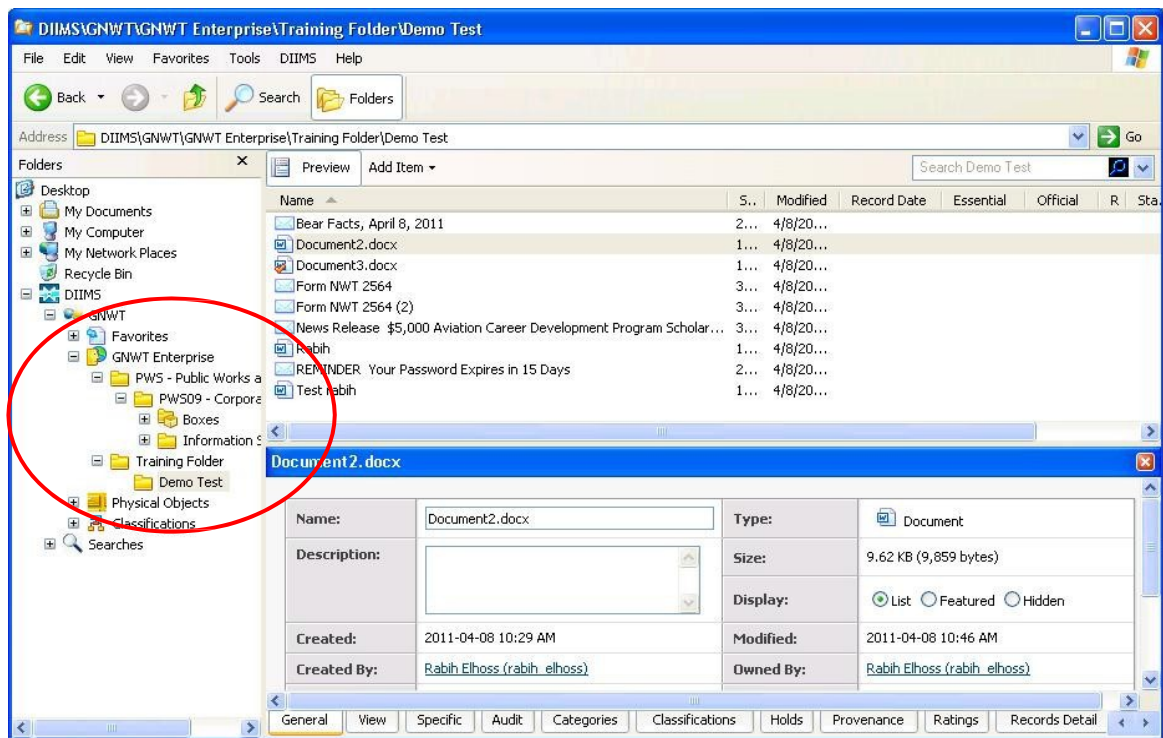

Figure 6-1: The DIIMS interface

2. Expand the **DIIMS > GNWT** folder to view the Corporate File structure. Please refer to figure 6-1. *The DIIMS folder contents display in the same manner as in the Network folder directory view.*

3. Click on a folder in the Folders pane to see the contents of the folder in the View pane. Please refer to figure 6-1

2. Navigating the DIIMS Windows Explorer Interface

This interface provides a one-stop location to view GNWT information, search for information and access various areas of the DIIMS repository and content in the network directories.

The same layout and toolbars that business users employ to access information in the network folder hierarchy are available in each sub-level of the GNWT hierarchy.

Each individual user has the ability to view and edit items based on his or her access permissions.

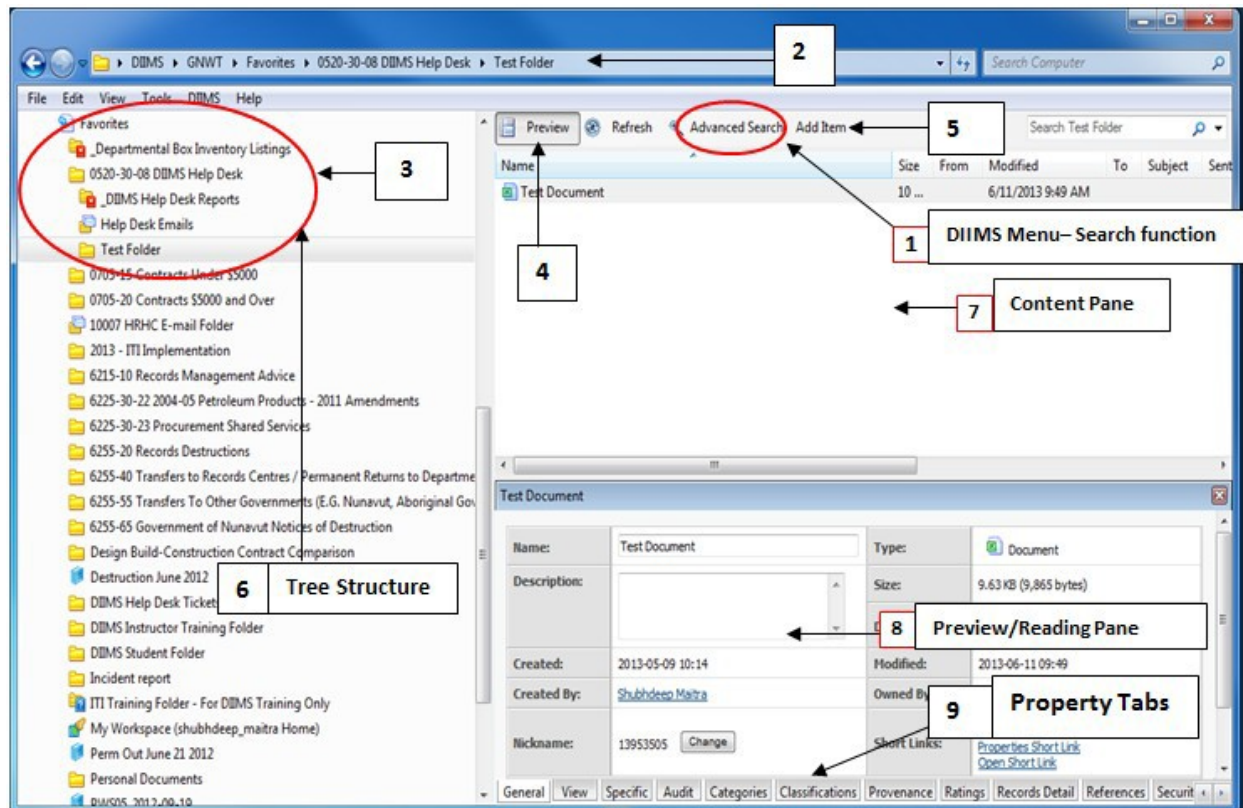### 2.1 Identifying the Screen Components of the DIIMS Interface

Figure 6-2: The GNWT Enterprise Workspace

1	Search Function	Searches for information in DIIMS. See Chapter 5, 'Searching for Information.'
2	Address Bar	Displays address of selected folder
3	Folder Pane	Displays folder structure of network directory and DIIMS
4	Preview Button	Displays properties and preview of selected item in Preview pane
5	Add Item Menu	Displays menu to add documents, folders or other items.
6	Folder Structure	Displays folder structure
7	Content Pane	Displays contents of selected folder
8	Preview Pane	Displays content of selected item in Content pane

9	Property Tabs	Displays metadata of selected item in content pane

3. Accessing and Adding Information – Windows Explorer

There are several ways to access and add information within DIIMS:

1	Search Function	(from the DIIMS menu) Searches for information in DIIMS. See Chapter 5, 'Searching for Information.'
3	Folder Pane	Access information from the folder structure in the network directory and DIIMS
5	Add Item Menu	Adds documents, folders or other items.
6	Folder Structure	Access information from the folder structure
7	Content Pane	View contents of selected folder from Folder pane
10	Property Tabs	View information of selected item in read-only format

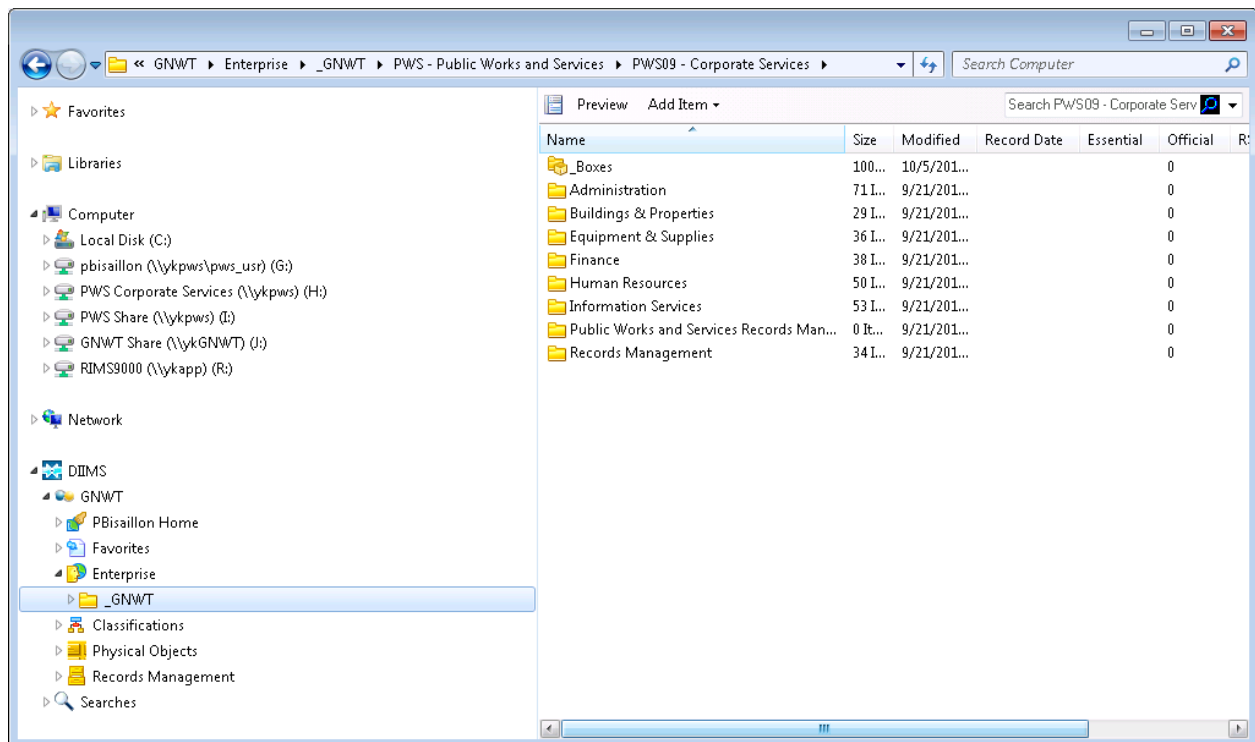*Table 6-1 methods to access information*

Figure 6-3: Access Tools

4. Using the Functions Menu – Windows Explorer

4.1 To display the Functions menu

1. In the content pane **right-click** on the item
2. Click on the right arrow to access more functions from the submenu, e.g. More, Properties, Send To

Note
The available options from the function menu are dependent upon the user's permissions for that item and vary depending on what item is selected.
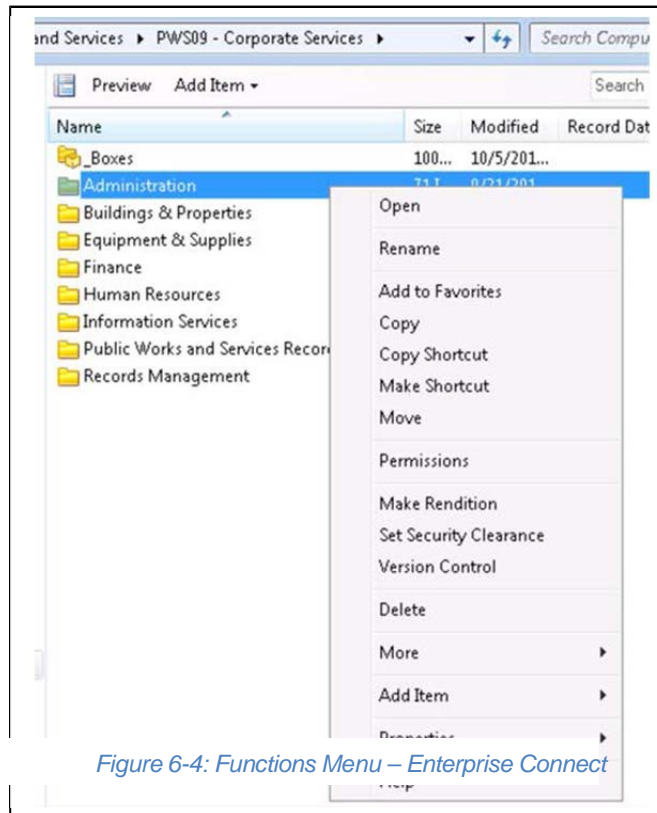

Figure 6-4: Functions Menu – Enterprise Connect

5. Viewing Documents from MS Office

5.1 To open a document from MS Office application:

1. Launch MS WORD (DIIMS is integrated with Word, Excel, PowerPoint, Project, Acrobat and Outlook)
2. Click **File**>**Open**. *The DIIMS Open Dialog box appears*
3. Browse to the location of the document
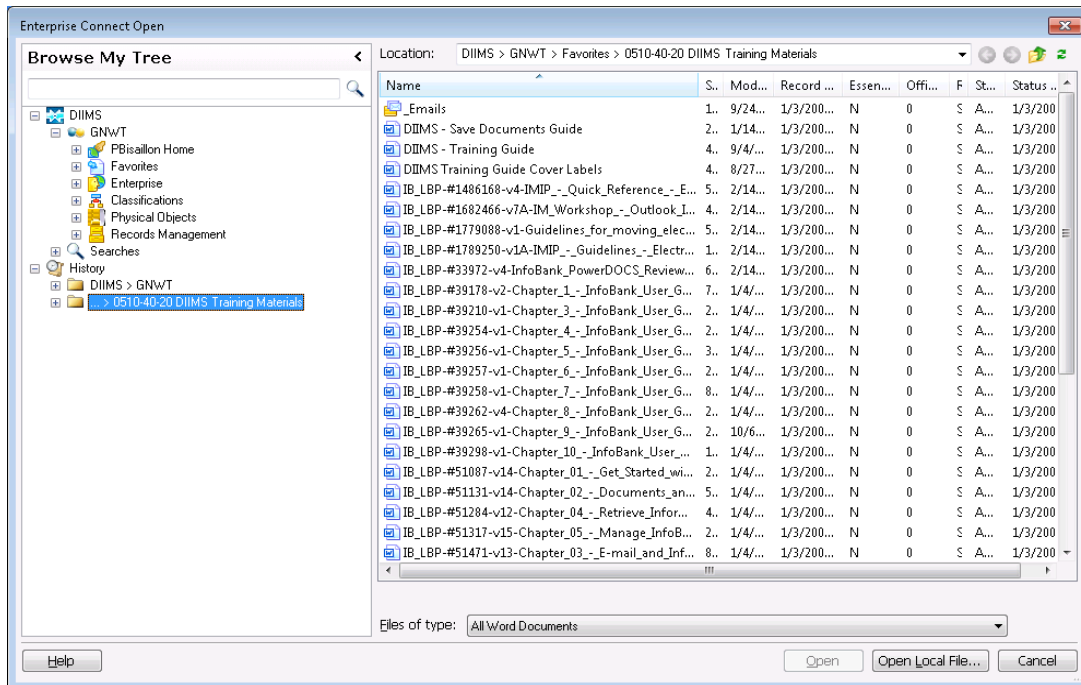4. Select the document and click **Open**

Figure 6-5: MS Word Open Menu structure

6. Viewing DIIMS Item Metadata

An item's properties (document descriptors) are saved as metadata in the **Properties** page (accessed under **Properties** in the document's **Functions** menu). The tabs that display in the Preview pane are dependent on the configuration by the System Administrator and your permissions.

The item properties are accessible in two ways:

1. From the item's Functions menu (right click – Properties)
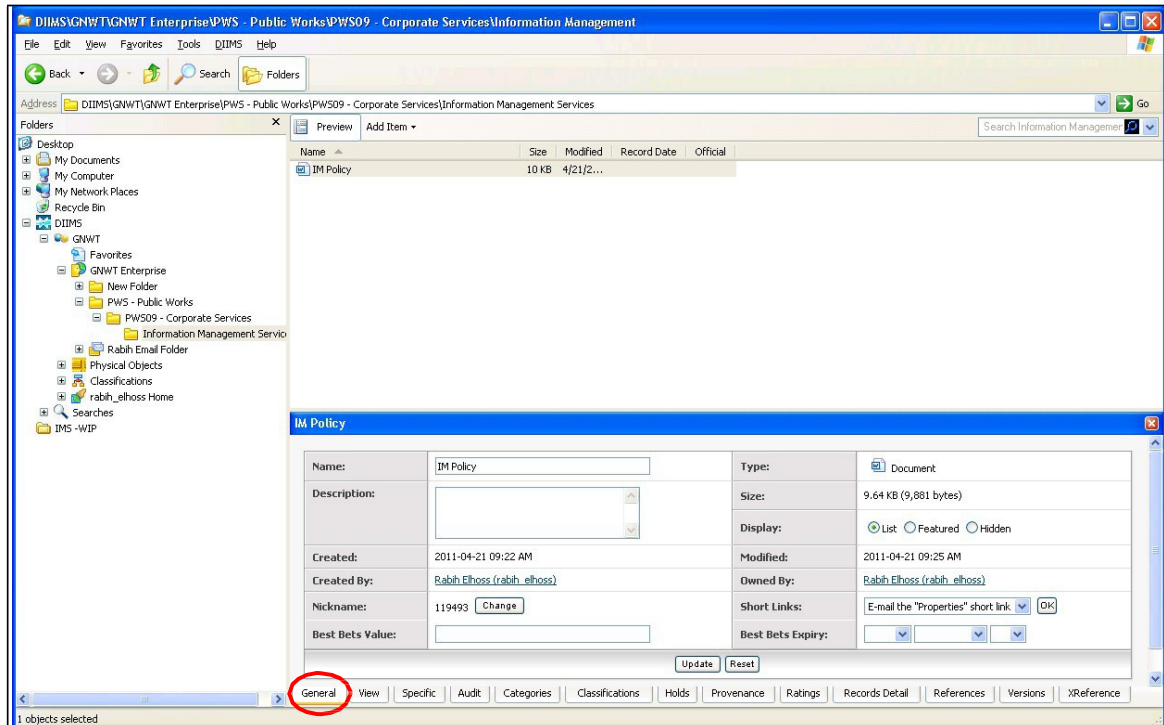2. From the Preview pane

Figure 6-6: The Specific Properties page from the General tab

7. Adding Information

Adding information to the corporate repository in DIIMS is similar to adding information in the shared corporate folder structure: navigate to the folder where you want to keep the item, and then create it. The new item will inherit the classifications and permission access from the folder level.

7.1 Adding Folders & Existing Documents

DIIMS Folders that have a File Number in the name are managed by Departmental Records Management staff. New folders can be created inside these managed folders.

📁 6010-00 Policies and Procedures 🔽 🔒
📁 6010-01 General 🔽 🔒
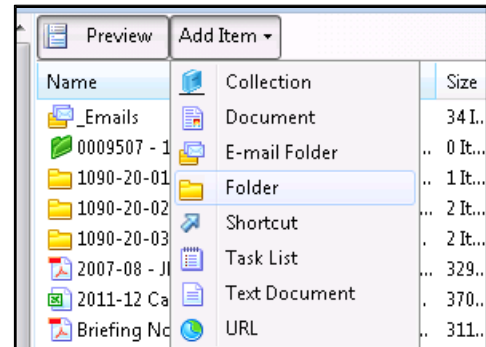📁 6010-15 Business Continuity Plans 🔽 🔒

If a new file number is required, contact your Departmental Records Coordinator.

A DIIMS folder performs in a similar manner to your network-shared directories: it is a container used to organize your information. Permissions applied at the folder level are inherited by the items added to the folder. However, once added to the folder, an item's access permissions may be modified on an individual basis by the item creator or those who have permission.

Users may add documents to a folder if they have permission to do so; otherwise, the Add Document function is inactive.

To add folders to DIIMS:

1. Navigate to the location where you want to add a folder.
2. Click **Add Folder** from the **Add Item** bar. *DIIMS opens the **Add Folder** page.*

Figure 6-7: The Add Folder page

3. Complete the **New Folder** page with the required information
4. Click **Add**. *The new folder is added to the location you specified.*
5. *Repeat Steps above for Documents, but select "Add Item – Document"*

8. Adding/Editing Documents from MS Office Applications

DIIMS Users may also add a document directly from an MS Office application (DIIMS is integrated with Word, Excel, PowerPoint, Project, Acrobat and Outlook)

8.1 To add a new document from MS Office to DIIMS:

1. Create a document from a MS Office application.
2. Click the **File > Save As**. *The Save As window appears. See figure 2-11.*
3. In **Browse My Tree** pane, navigate to your Favourites or a folder where you would like to save the document
4. Enter the document name.
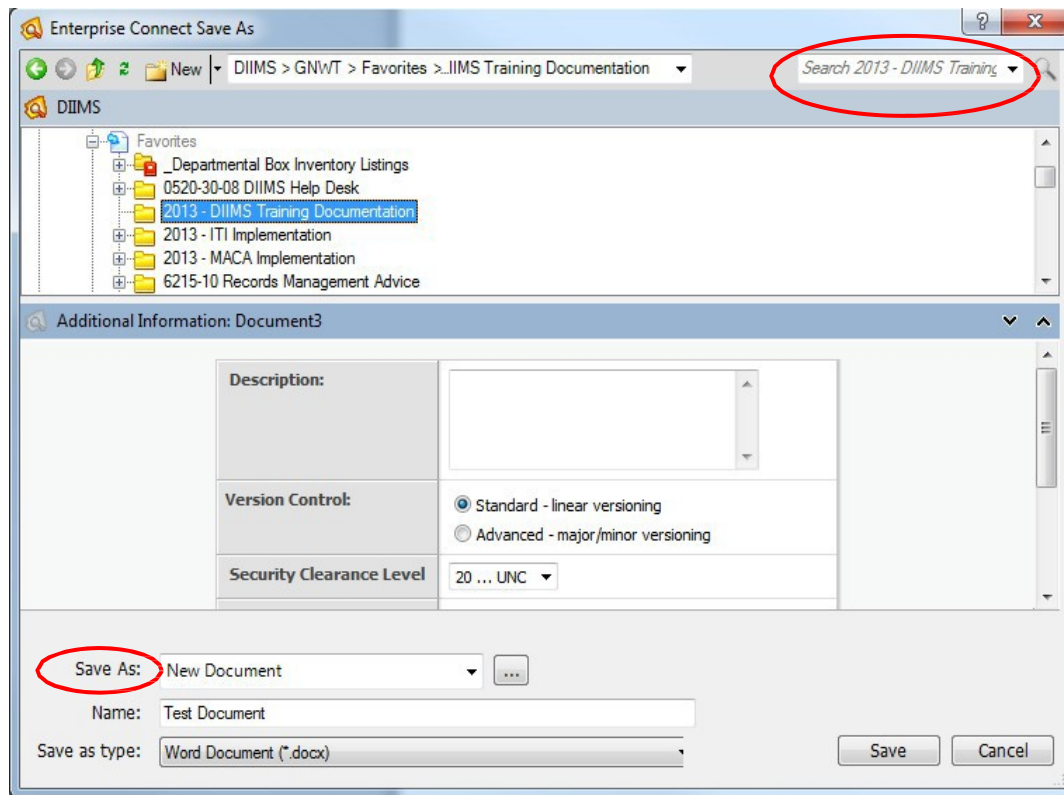5. Complete the additional metadata, if required

Figure 6-8: Save As page from MS Office

6. Click **Save**. *The new document is saved to DIIMS.*

Note: It is recommended that you save your document at frequent intervals during the edit process.

9. Importing Items Using Drag & Drop

The drag & drop function provides a quick way to add several items from the network shared drives and local drives to DIIMS.

9.1 To import multiple items with Drag & Drop:

1. Ensure the items you want to import are located on your computer desktop or that you have DIIMS open on your desktop.
2. Navigate to the container in DIIMS into which you want to import the items.
3. Drag and drop the items from your computer desktop or folders into the chosen container in the DIIMS repository. See Figure 2-20.
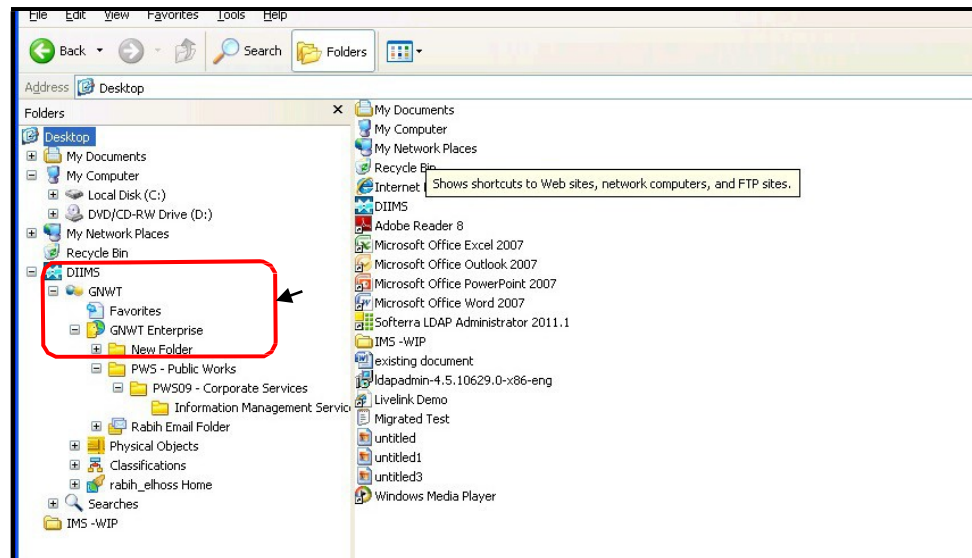

Figure 6-9: The Drag & Drop page

10. Searching for Information

To search for information, you need to specify criteria (such as author, words and context) in the **Search** bar. Indexing information enables the system to identify and locate the documents that match the specified information. The information displays in the **Search Result** list.

10.1 To perform a search from Windows Explorer

1. Activate the DIIMS menu by clicking anywhere within the "DIIMS" node.
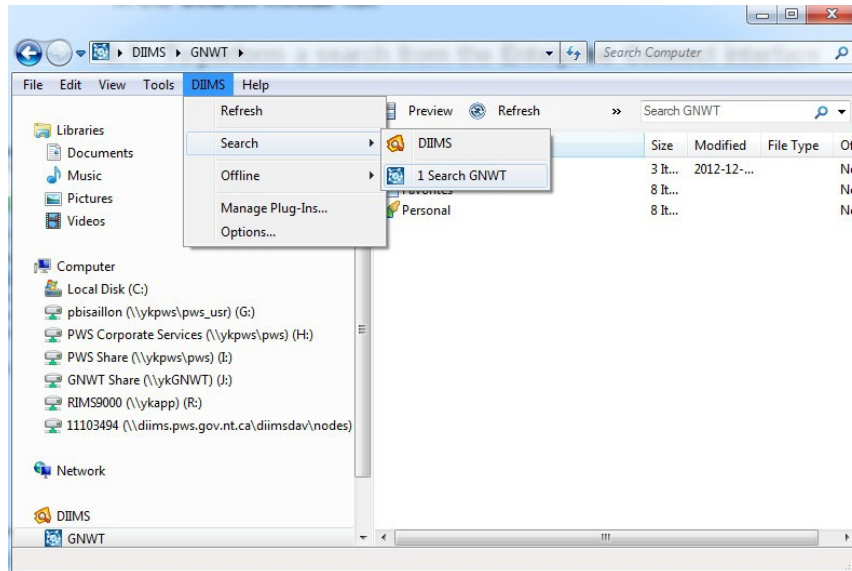2. Select **DIIMS**>**Search**>**GNWT Search** from the main menu.

Figure 6-10: Advanced Search – Enterprise Connect

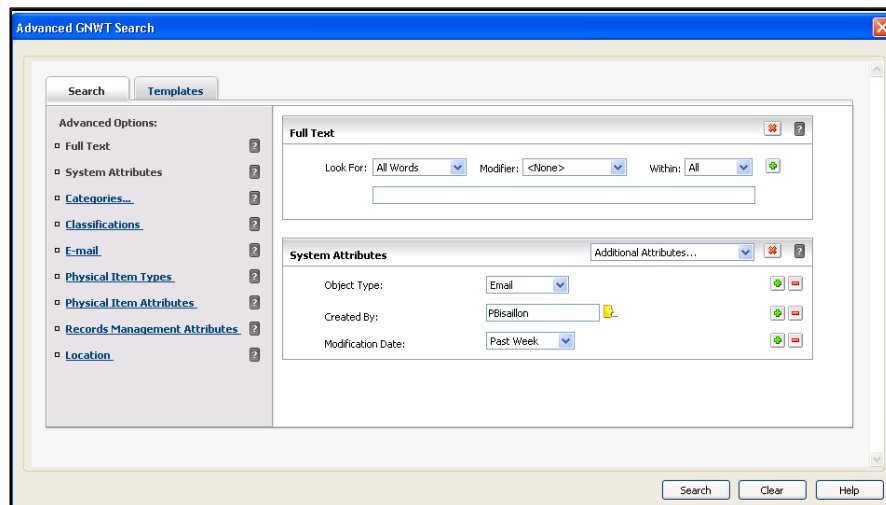3. Enter search criteria and click **Search**.

Figure 6-11: Advanced Search page

4. Your results display in the **Search Result** window.

11. Saving your Searches Locally

Once you have located the information you were seeking, you can save the specified search locally on your workstation for future use. DIIMS saves this search as a query, which can be re-used. Each time you click on the query, a new search is generated based on the saved criteria; an updated search result is provided.

11.1 To save a search as a query:

1. Generate a search.
2. In the Folder pane, expand **Searches > Search History**.
3. Select the search that you want to save, and right click on it to display the context menu.
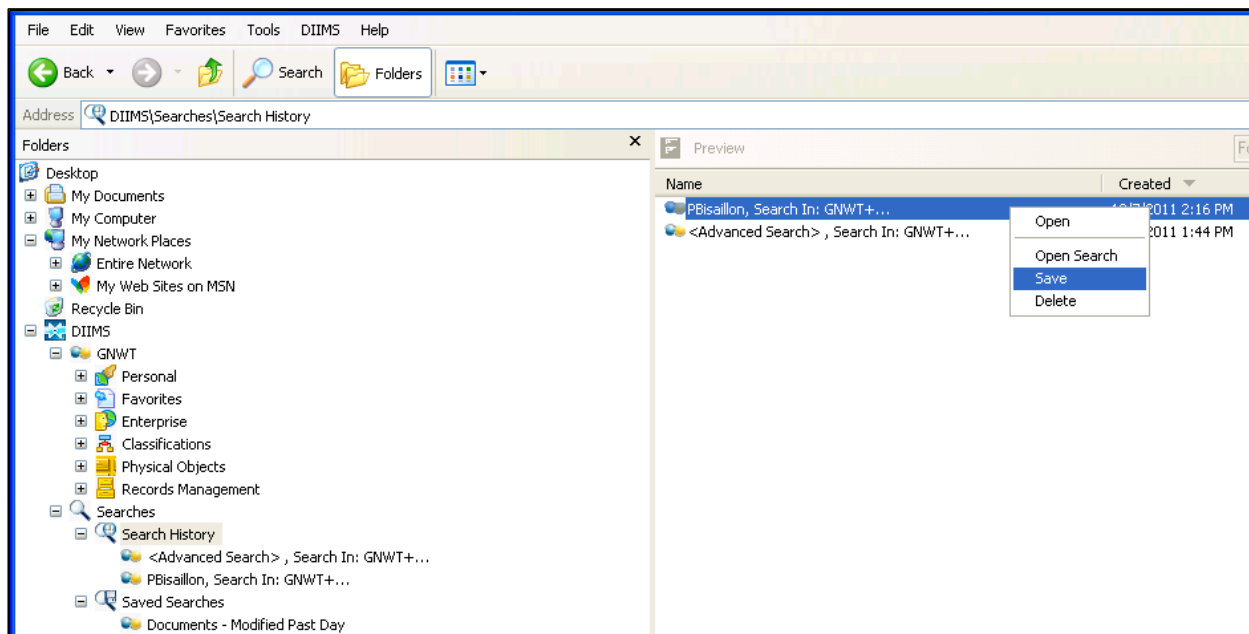4. Select **Save** from the context menu. *The Save Search window appears.*

Figure 6-12: Save Search Query Page

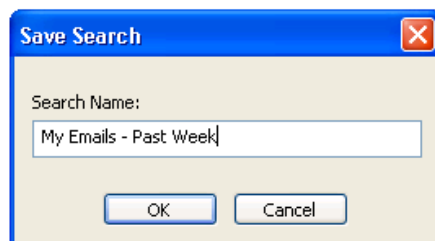5. Complete the **Save Search Query** name page:

Figure 6-13: Save Query name page

6. Click **OK.** *The query appears in the **Saved Searches** list.*
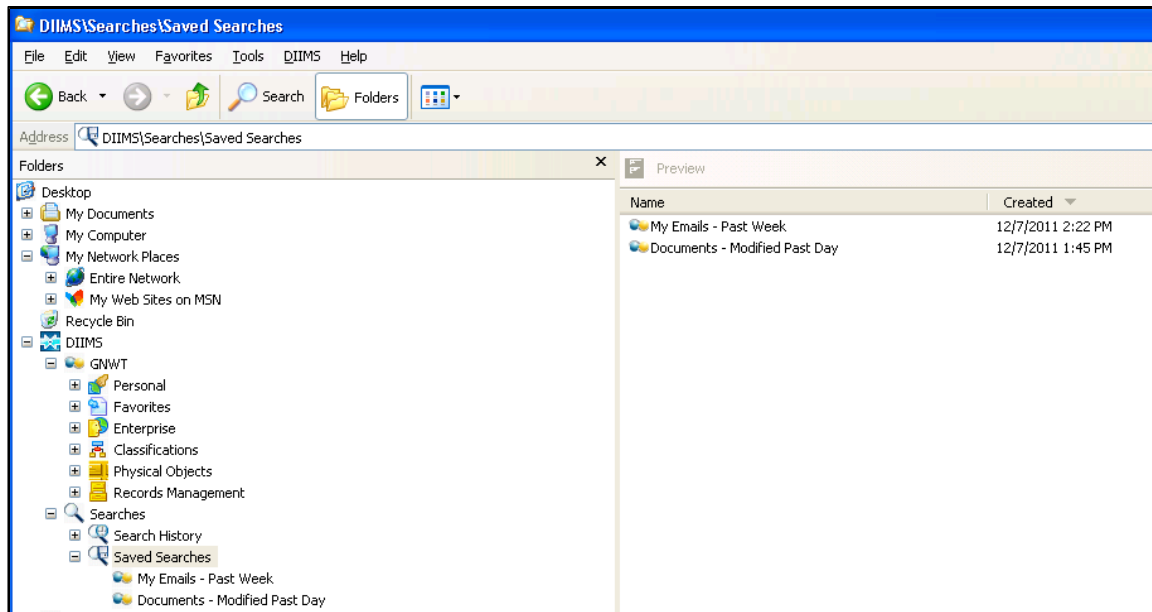

Figure 6-14: Saved Searches list

12. Managing Emails within DIIMS

DIIMS facilitates collaboration and knowledge management by enabling business users to save MS Outlook e-mails directly into DIIMS.

DIIMS adds an external folder to the MS Outlook directory, which enables users to access DIIMS directly from the MS Outlook application. The functionality is very similar to the Windows Explorer interface.

Users have the option to save their emails upon sending, perform bulk copies, or drag and drop individual emails into DIIMS. It is up to the user to decide which option is the most suitable for them.

12.1 Sending and Filing e-mails

DIIMS users can send and save emails directly into DIIMS upon sending. This method is very useful if you are consistent. If you save every business related email upon sending, then you can easily delete all of your "Sent Items" in Outlook knowing that it has already been captured and saved in DIIMS.

To send and file an email:
1. Create an email.
2. Click **Send and Save.** You will be prompted with the DIIMS profile form.
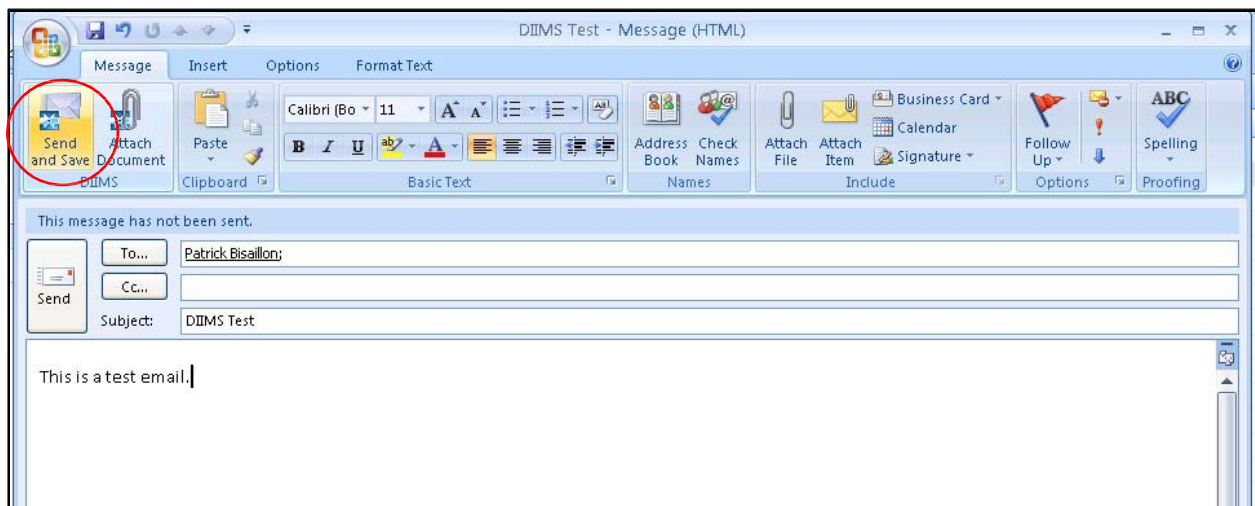

Figure 6-15: Send and Save E-mail

To select a folder in which to save the email, perform one of the following actions:
2.1. Click **DIIMS > GNWT** and then click a folder from within your "**Favorites**" list
2.2. Browse the folder structure under the **"Enterprise Folder"**
2.3. Select from the "**History**" list
2.4. Click a folder name in the "**Location**" list
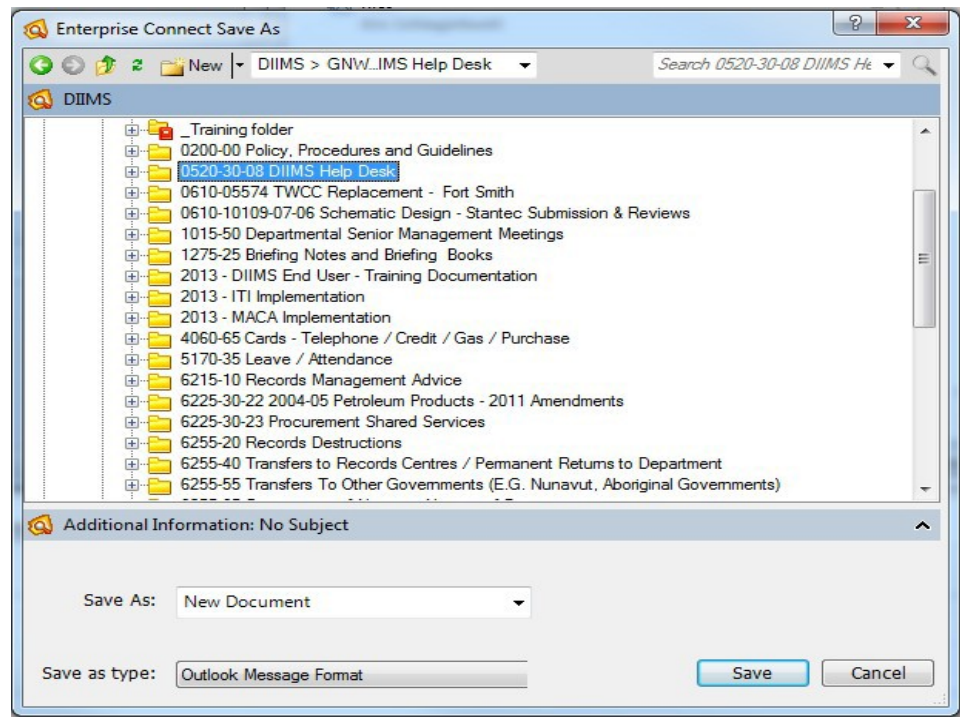2.5. Perform a search to locate a folder
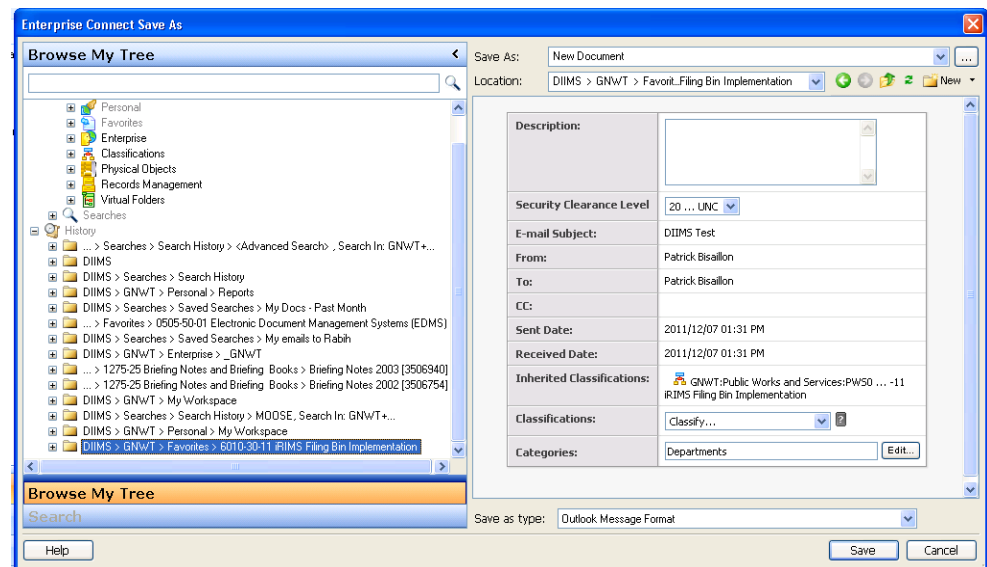
Figure 6-16: Send and Save page

Figure 6-17: Save as- Folder

3. You must ensure that a valid profile form is displayed before the email can be saved to DIIMS.

   3.1. Specify any required profile information for the item. *The profile requirements depend on the selected destination*

   3.2. Click **Save.** *The email is sent, classified, and saved to the appropriate folder*

12.2 Adding DIIMS attachments to e-mails

To attach a file from DIIMS to an e-mail:

1. Create an email.
2. Click on **Attach Document** from within the DIIMS tab.
3. To select a document to attach, do one of the following to find it:
    - (a) Click **Browse My Tree**, and then click a folder from within your "**Favourites**" list. All the documents will appear in the list.
    - (b) Browse the folder structure under the "**_Enterprise Folder**"
    - (c) Select a folder from the "**History**" list
    - (d) Execute one of the "Saved Searches" from the "Searches List"
4. Click the file, and then select either **Insert as attachment** or **Insert as Link –** only use **Insert as Link** if you are sending this email to somebody that is using DIIMS.
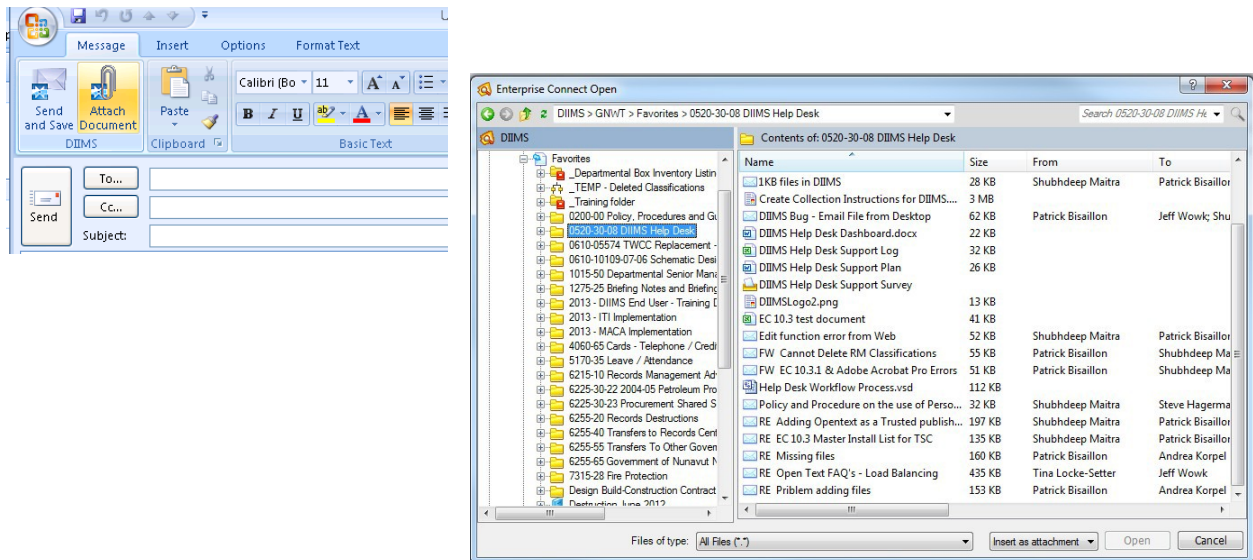5. Click **Open**.
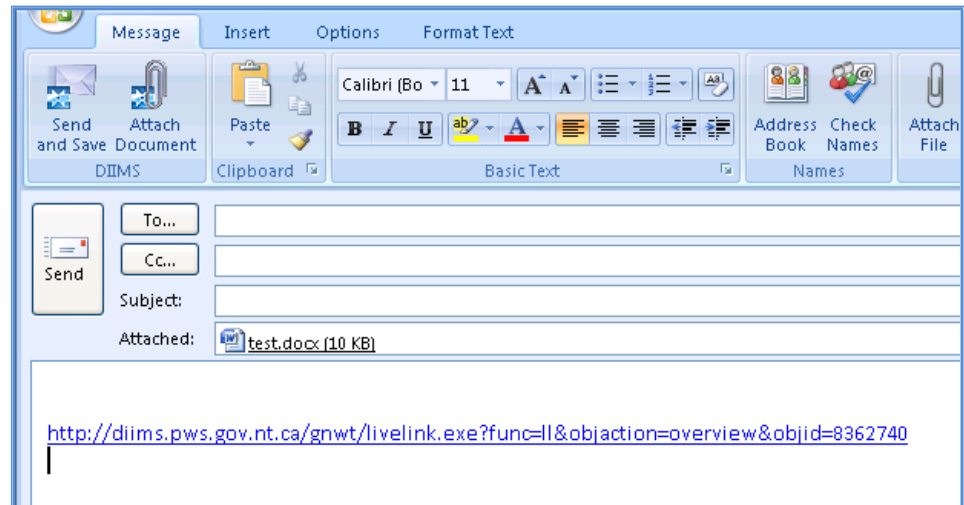

Figure 6-18: Browse Tree- Folder

Figure 6-19: Email with DIIMS attachment

12.3 Creating a New Folder While Saving Email

This function allows you to create a new folder prior to saving an email to DIIMS.

To create a new Folder while saving an email

1. Follow the steps to **Send and Save** an email to DIIMS
2. Navigate to the folder where you would like to save the email
3. If there isn't an **Email** folder, you can create at this location:
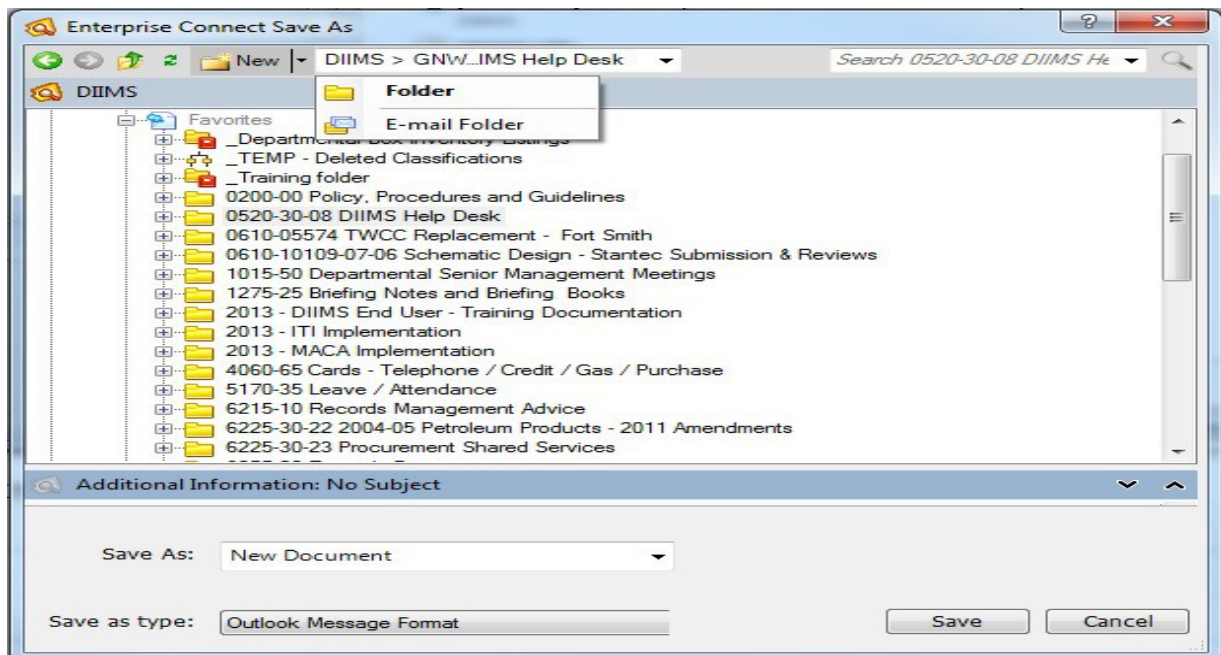4. Click the dropdown next to **New** and select **E-mail Folder**

Figure 6-20: Create new email folder command

5. Fill out the profile form and click **Add.** *It appears in the list and can be selected as a destination*

Figure 6-21: New Email Folder profile form:

12.4 Moving Emails into DIIMS

Emails can be moved from your Inbox, Sent Items, and folder hierarchy within Microsoft Exchange and from PST files. There are two methods that can be used to perform this action.

1. **Bulk Copy/Move** – Select emails and use the "***Bulk Copy/Move***" function built into Outlook.

    a. **The Bulk Copy/Move is the recommended method** for moving large quantities of emails into DIIMS. You will be able to continue using Outlook while emails are being saved to DIIMS.

2. **Drag and Drop** – Select emails and "drag" them to a folder within DIIMS.

    a. This method can be more convenient if you are moving multiple individual emails to DIIMS as you can have your folder structure in DIIMS expanded, and drag them to the appropriate folders.

    b. Using this method locks Outlook until the emails are all saved into DIIMS. This method is suitable for small quantities of emails.

    c. When a "Drag and Drop" action is performed, the email is "moved" from its original location into DIIMS, meaning it will be deleted from its original location.

Using the "Drag and Drop" method

1. Click the item
2. Hold down **SHIFT**, and then drag the item to its destination location
3. You can move multiple items by selecting them prior to dragging. To select items that are in sequence, hold down **SHIFT** when you click. To select items that are not in sequence, hold down **CTRL** when you click.
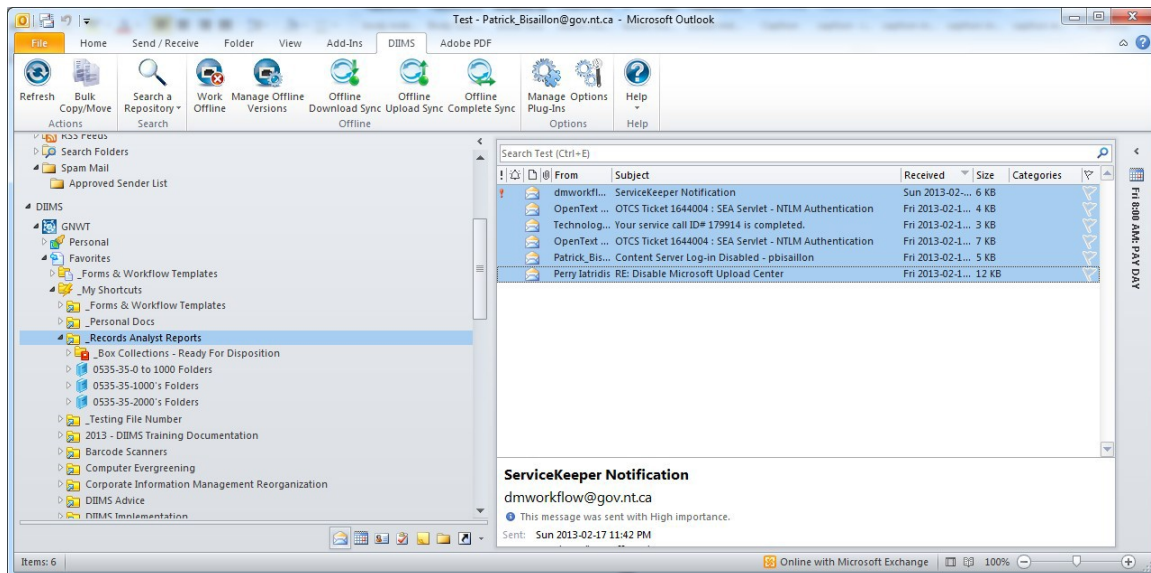
Figure 6-22: Drag and Drop the emails that you want to move

Using the Bulk Copy/Move command in MS Outlook

To use the Bulk Copy/Move:

4. In MS Outlook, select the items you want to copy or move (emails or folders)
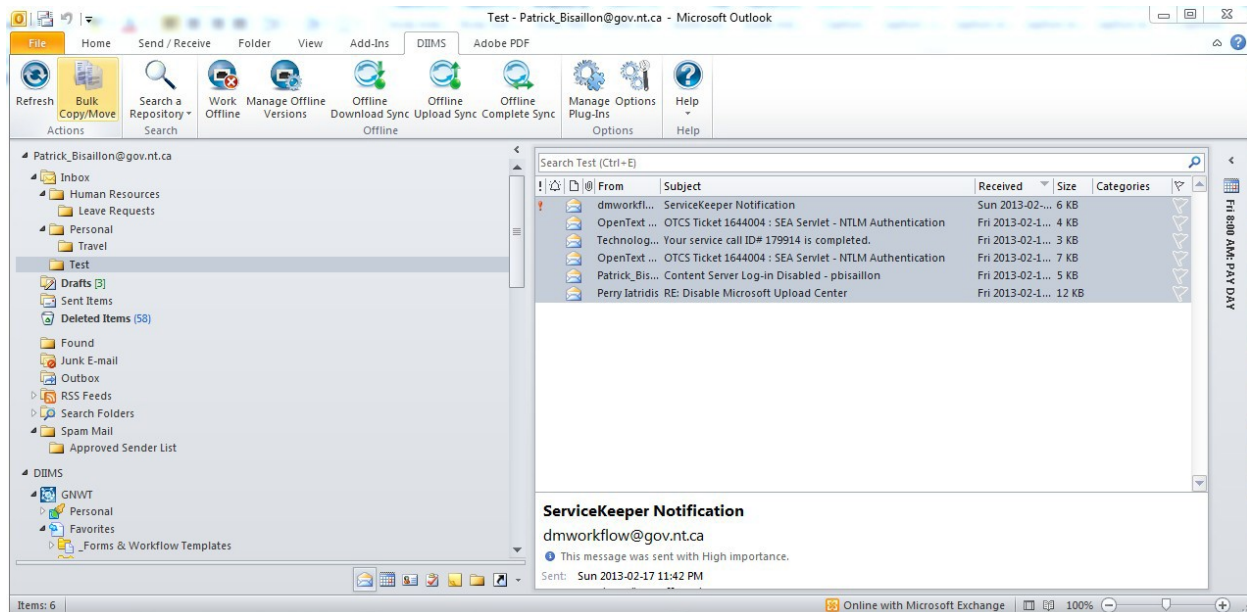5. From the **DIIMS** menu ,click **Bulk Copy/Move**

Figure 6-23: select the items you want to copy or move (emails or folders)

6. In the **Select Destination** dialogue box, specify the location where you want to copy the items. You can also use the "search bar" to search for the folder
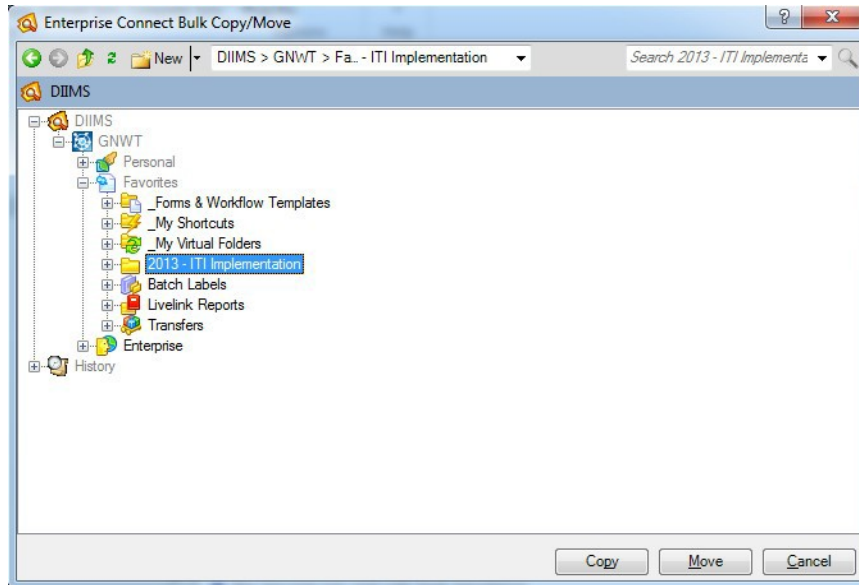
Figure 6-24: Bulk copy/move folder structure in Outlook

7. Select one of the following options:
   - **Copy** – Creates a copy in DIIMS
   - **Move** – Removes the items from MS Outlook

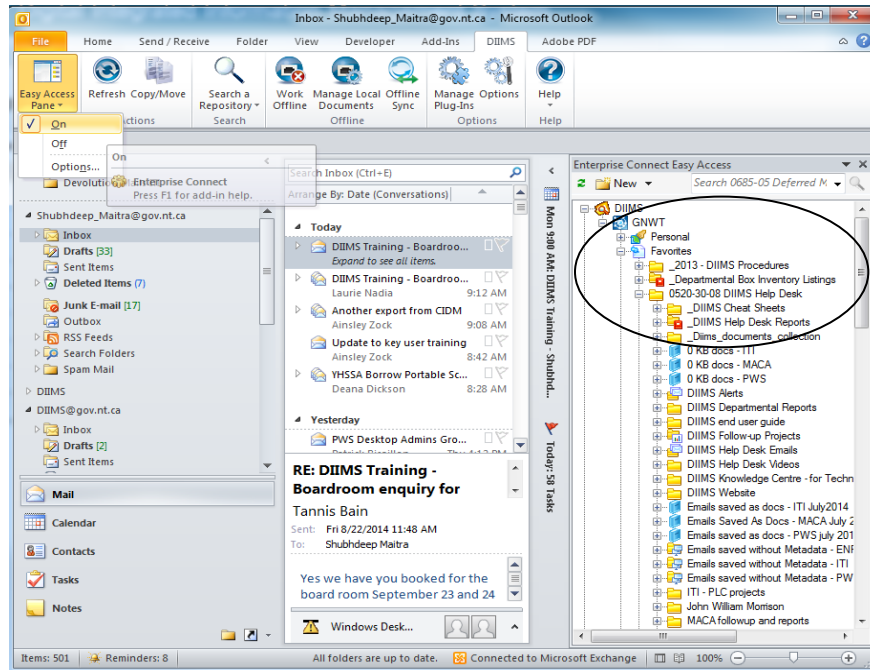Using the DIIMS easy-access pane in Outlook to move emails

Figure 6-25: Enterprise Easy Access Pane

The DIIMS easy access pane in Microsoft Outlook enables users to view the folder structure and their contents conveniently in a separate pane within Outlook. This enables users to refer to a document while reading an email without leaving the Outlook interface.

Users also have the flexibility of turning off the Easy Access Pane by checking On/Off option on the top-left corner as shown above.Users also have the ability to move emails from Outlook to a DIIMS folder within Outlook using the **Drag and Drop** method.

(*Note: Using the drag and drop method for moving emails in Easy access pane does not freeze Outlook. The Drag and Drop method moves the email instead of copying.*)

12.5 Searching Emails in DIIMS:

Emails can be easily searched within DIIMS using one or combination of search filters. Commonly used search filters include Email From, Email to, Email Sent Date, Email Received Date and Emails with/without attachments. To search emails:

12.5.1 When you know which folder to search (from the Web interface)

➢ Click on the folder to see its contents

➢ In the search box on the top-right corner of the page type an asterisk (shift 8) and click the " **Go**" button
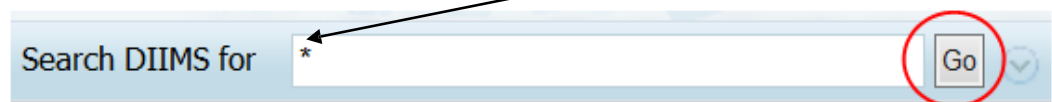
➢ The resultant page displays a list of all the emails. Scroll Down. On the left pane of the screen you will see the various filters as mentioned above like Email From, Email To, etc.

Email From

Shubhdeep Maitra (116)
Patrick Bisaillon (16)
DIIMS (12)
Terry Kungl (8)
Jeff Wowk (7)

15 More...

Email To

Shubhdeep Maitra (80)
DIIMS (15)
Patrick Bisaillon (7)
Jeff Wowk (5)
Terry Kungl (4)

15 More...

Email Attachments (0=No, 1=Yes)

0 (244)
1 (11)
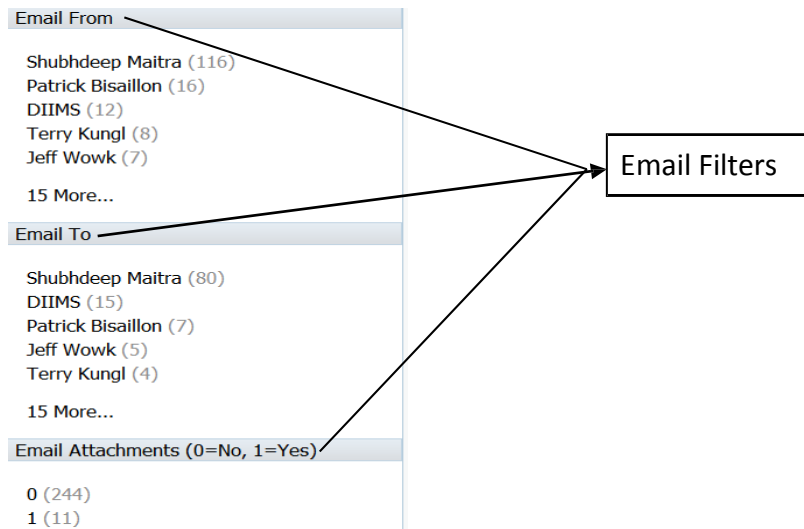
Email Filters

➢ Narrow down your search by choosing filters from the left pane of the screen. You will now see the list of emails that match the criteria selected by you.

12.5.2 When you do not know which folder to search (from the Web interface)

> Go to the DIIMS Enterprise page. You can access it by clicking on the following link: http://diims.pws.gov.nt.ca/gnwt/llisapi.dll?func=llworkspace

> In the search box on the top-right corner of the page type an asterisk. Click on the drop-down to the right of the "**Go**" button **>** Under "Object type" choose "Email" **>** Click the "**Go**" button
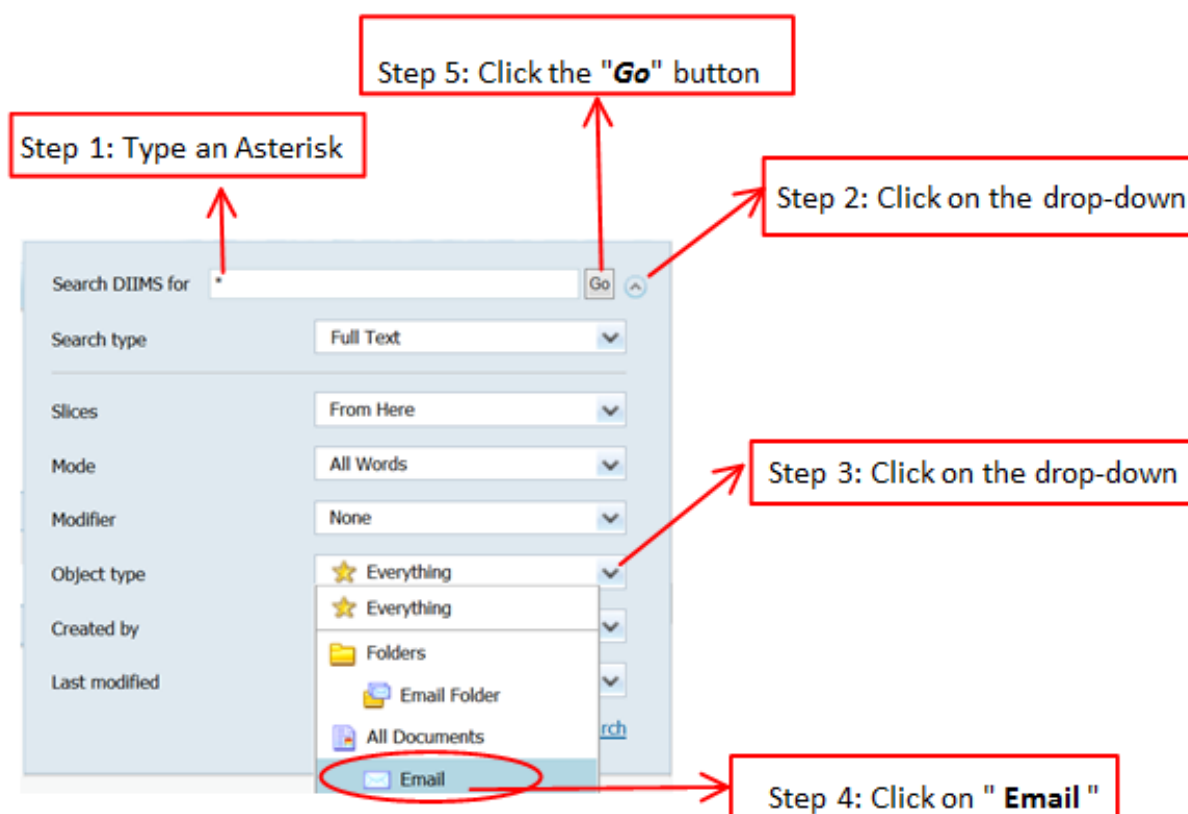
> On the results page, scroll down on the left to see the filters for email like "Email From", "Email To", "Attachment". Choose filters to narrow down your search.

External DIIMS Access

DIMS External can be accessed from anywhere in the world as long as you have an internet connection. The purpose of this external access is for DIIMS users to always have access to their content regardless of where they are.

To ensure security of information, and protection against viruses and vulnerabilities is maintained, GNWT employees **are required to adhere to the terms of use** identified below.   There is a secure "pipeline" and the data is encrypted between your client and the GNWT network however employees should be conscientious about the locations they use to access DIIMS External.

Terms of Use:

GNWT Employees:

1. Must fill out a request form before external access is granted. The form is accessible by following this url:
http://diims.pws.gov.nt.ca/gnwt/llisapi.dll/open/15901240

2. Must ensure to logout of DIIMS prior to closing their internet browser when they are done using DIIMS External. (See page 3 for instructions)

3. Must ensure that they have adequate virus protection on the workstation they are using to connect to DIIMS External. (GNWT employees can access free copies of Trend Micro for their home computers:
http://www.tsc.gov.nt.ca/pdfs/homeantivirus.pdf)

4. Shall not breach or otherwise circumvent any security or authentication measures (IE:provide their GNWT credentials to anybody else to use DIIMS External on their behalf)

5. Will only save content to DIIMS that came from a trustworthy source and that can be opened by standard GNWT applications.

6. Will not allow the internet browser to "auto save" their credentials
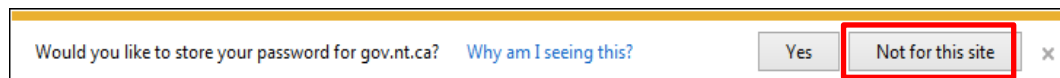
7. Have an obligation to protect government information and the integrity of government assets and will adhere to the following policies when using DIIMS External:

   a. Electronic Information Security – 6003.00.26

   b. Management of Electronic Information – 6003.00.20

How to Login:

1. DIIMS External can be accessed by visiting https://diimsxt.pws.gov.nt.ca (only from outside the GNWT Network)

2. Enter your GNWT email address and password in the boxes provided.
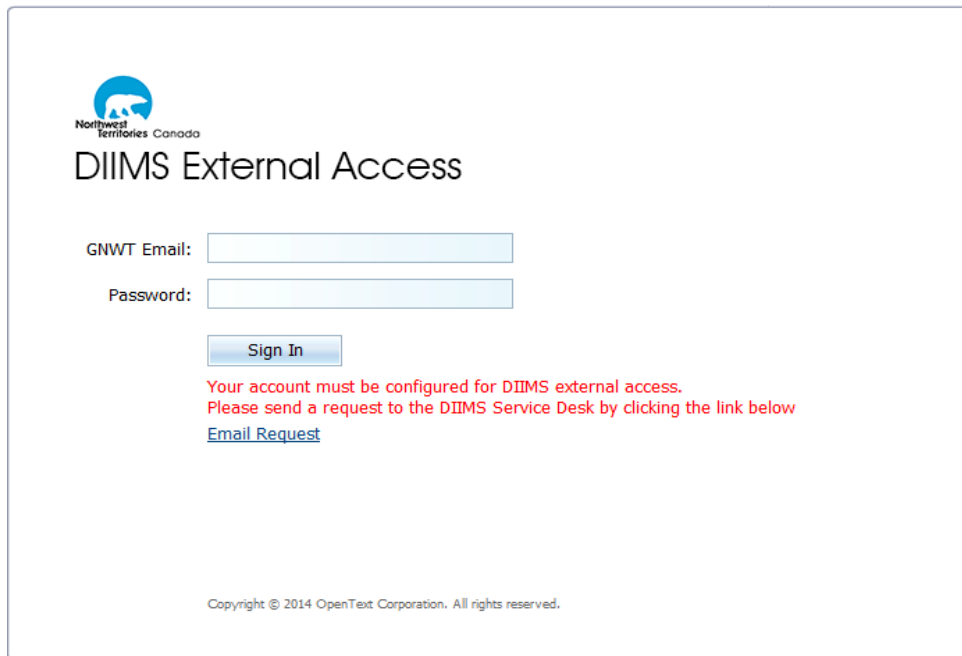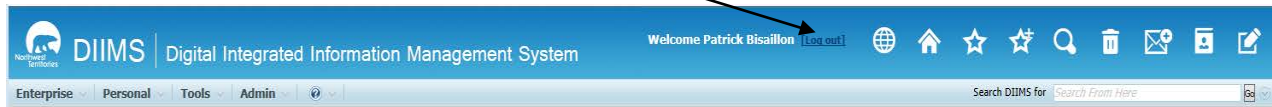
Figure 1 - DIIMS External Access Login Page

3. Once you click "Sign In" you will be redirected to DIIMS External

How to Logout:

1. Click on the "**Log out**" link displayed next to your name on the DIIMS banner and this will log you out of DIIMS External

2. After 20 minutes of inactivity, the system will automatically expire your session and log you out of DIIMS External and re-direct your browser to the login screen.
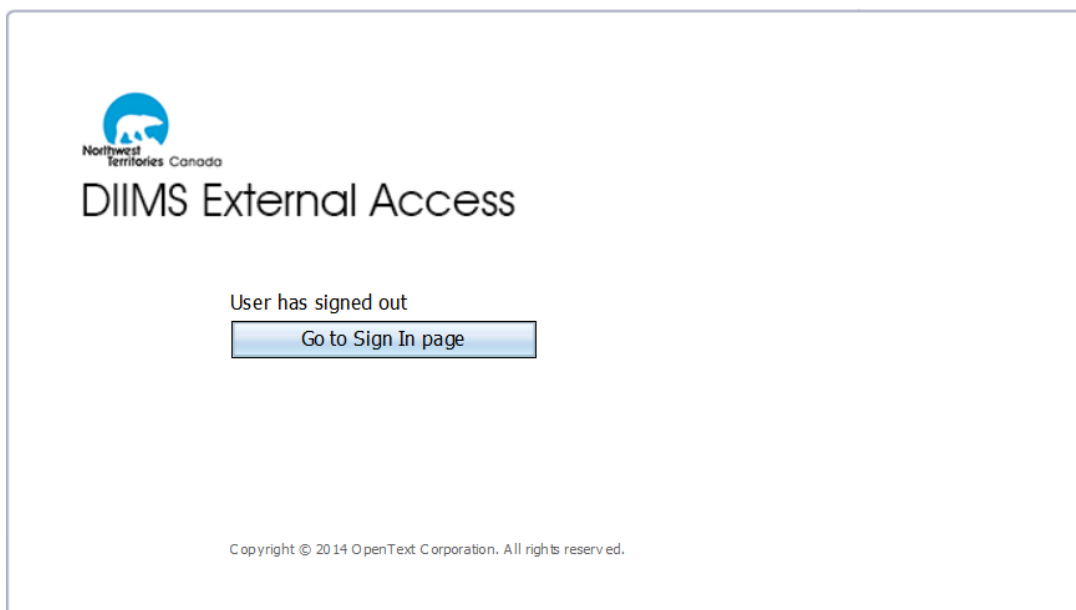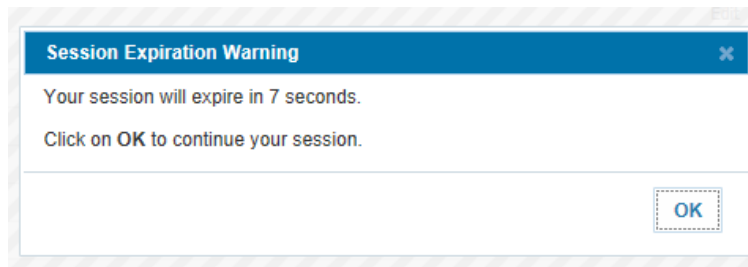

Figure 2 - DIIMS External - Logged Out Page

Functions Not Available:

There are a few functions that are not available when using the external site, but there are workarounds for them. Internet Explorer, Chrome, and Firefox can be used to access the external site on Macs, PCs, and mobile devices.

1. **"Drag and Drop" functionality**

   a. The "Drag and Drop" functionality has not been enabled on DIIMS External

   b. You are able to add individual documents by using the "Add Document" function

2. **The "Edit" function**

   a. The edit function is available if you are using a GNWT issued computer. If you are using your personal computer the "Open Text Office Editor" software will need to be installed. This is a small application and will not affect any applications on your workstation. Once installed, you will be able to click on "edit" from within the internet browser.

   b. These are only available to download when you are **not** within the GNWT network

      i. Windows 64 Bit Office Editor Download

      ii. Windows 32 Bit Office Editor Download

   c. To edit documents without the Office Editor client:

      i. Select the "***Download***" option next to the document and save it to your computer

      ii. Open the file on your computer and make edits to your document(s).After completing the edits ***save*** the document and ***close***.

      iii. To upload your updated document in DIIMS follow these steps:

         1. Browse to the document in DIIMS and click the corresponding function(drop-down) button
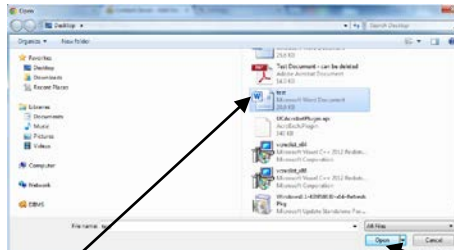
         2. Click "***Add Version***" option
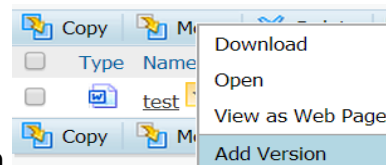
3. Click the "***Choose File***" option

4. Point to the updated document saved on your computer

5. Select the document and click the "***Open***" button

6. Click the "***Add Version***" button

3. **Embedded links pointing to the internal DIIMS site**

   a. Some documents/emails may have embedded links that point to the internal DIIMS site (IE: http:diims.pws.gov.nt.ca/). If you click on that link, you will get an error as you are trying to access the intranet site. Workaround is to modify the hyperlink to ensure that it is "**https**" and add the "**xt**" as part of the URL: IE: http**s**://diims**xt**.pws.gov.nt.ca.

4. **Menu Bar Links**

   a. The "Remote Assistance" and "Records Classifier Reports" links **will not work** as they are linked to internal GNWT websites that only accessible within the GNWT network.

DIIMS has an "offline" feature that is available mainly for DIIMS users with laptops. The purpose of this feature is to   enable access to offline content stored within DIIMS for employees who may need access to save, access and update documents while not connected to the GNWT network.

This feature allows you to identify and save content from DIIMS in an offline format so you can have access to the content when you are not connected to the GNWT network. Once you reconnect to the GNWT network, and return DIIMS to "Online" then your local documents will be uploaded and synchronized to DIIMS.

Please note that you need to be using the "Enterprise Connect" client to download items offline. (IE: DIIMS within Outlook/Windows Explorer). **To access DIIMS through Enterprise**

Connect double click on the **icon on your desktop.**

### Identify Offline Folders or Documents

1. The first step in the process is to identify which folder or documents you would like to download "offline". If you   do not have a designated folder, then **you will not be able to save your documents** as the DIIMS mandatory save feature is enabled. The process is the same for each method. **Right click** on the item and select "**Download Offline Version**"

There are various methods to selecting your documents:

   a. You can download individual documents while browsing through your favorites, or folder structure (If   you download a single document offline, then you will also be able to save new documents within the folder that it originated from)
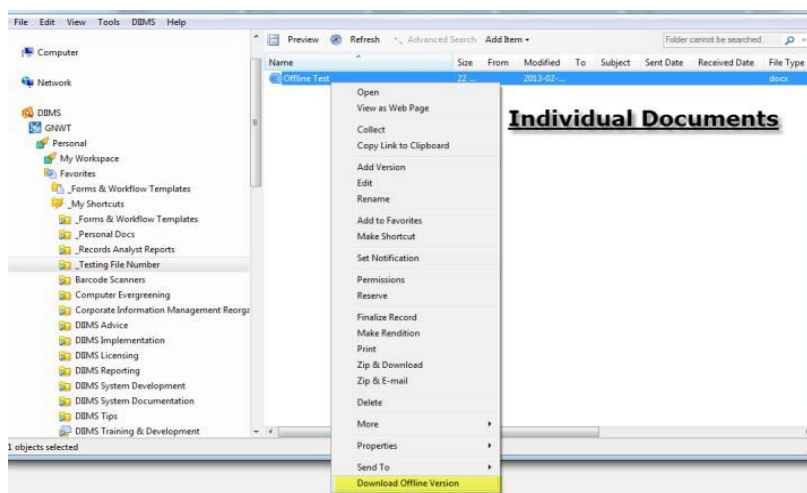
b. You can download an entire folder structure offline (**not recommended for folders with many   documents and subfolders**)
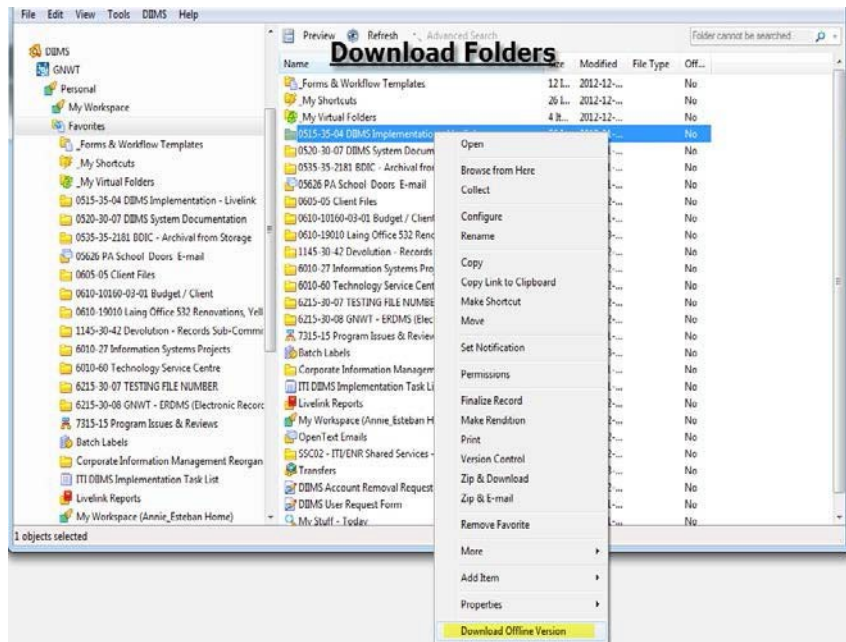

c. You can add a variety of documents to a "Collection", and then download that collection offline. DIIMS will download an offline copy of each document within that collection (this can be done on the web – IE: adding documents to a collection)
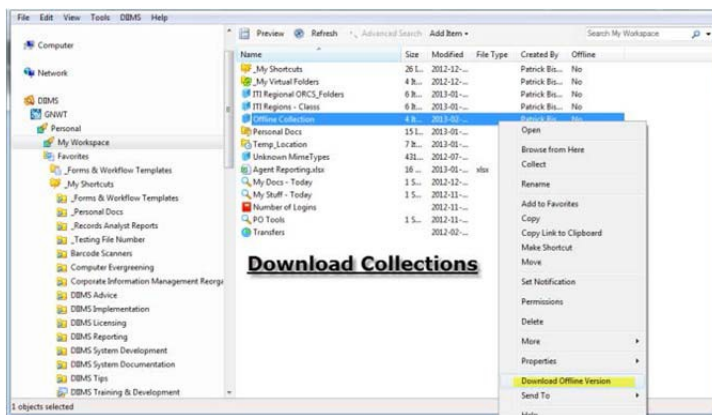
After the "Download Offline Version" function has been selected, DIIMS will briefly display a dialogue box showing the results of the download.
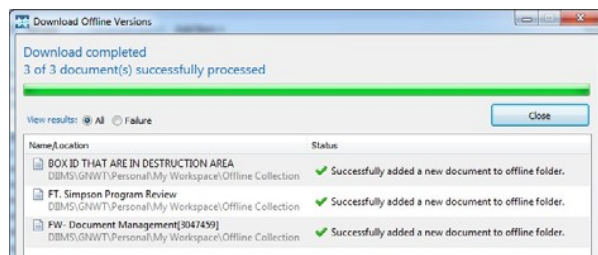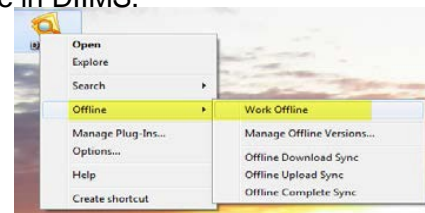
2. Once items have been downloaded offline, the "Offline" column will display "Yes".
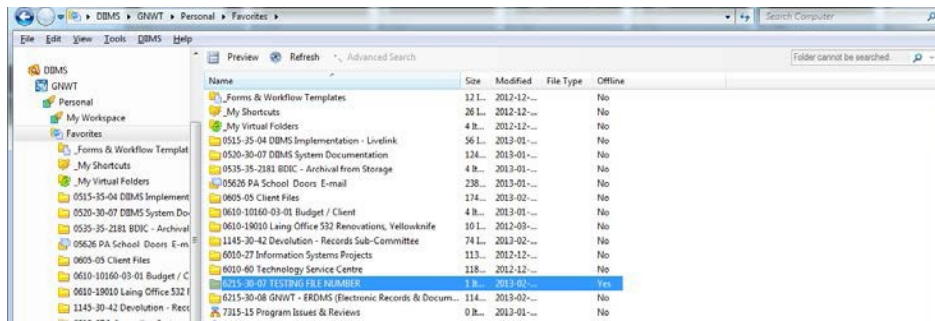

3. Once all documents have been downloaded offline and the laptop is disconnected from the GNWT network, you can enable the "Work Offline" feature in DIIMS.

   a. "Right Click" on the DIIMS icon that is on your desktop
   b. Select "Offline – Work Offline" from the menu
   c. DIIMS is now in "offline mode"

DIIMS Offline Mode

4. Once DIIMS is in Offline mode, you will only see the items and locations that you have offline versions of.

   a. You can edit the documents and any changes will be saved locally. After you reconnect to DIIMS these changes will be synchronized to the server.
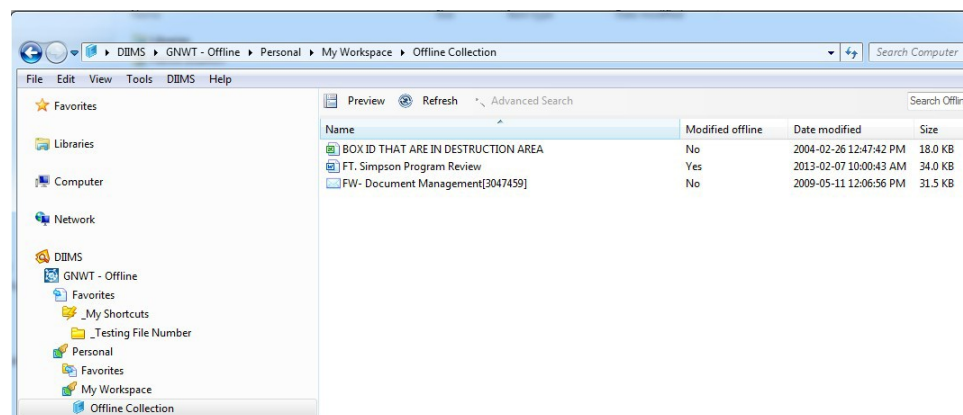

   b. You can see what offline documents have been modified. To do this, "right Click" on the DIIMS icon on your desktop and select "***Offline – Manage Local Documents***"
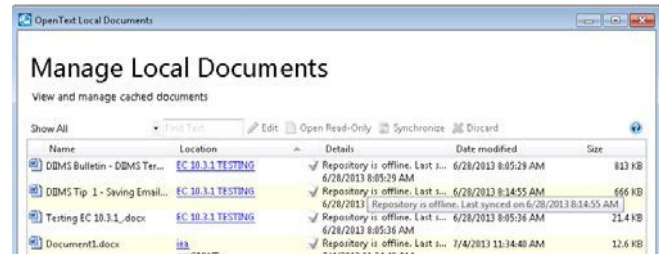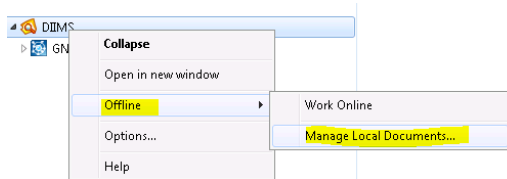
Bring DIIMS Back Online

5. When you are reconnected to the GNWT network, DIIMS needs to be brought back online in order to synchronize any documents that have been modified.
    a.   "Right Click" on the DIIMS icon on your desktop and select "***Offline – Work Online***"
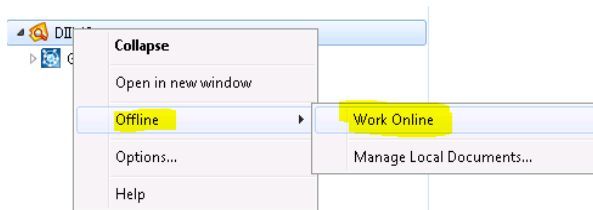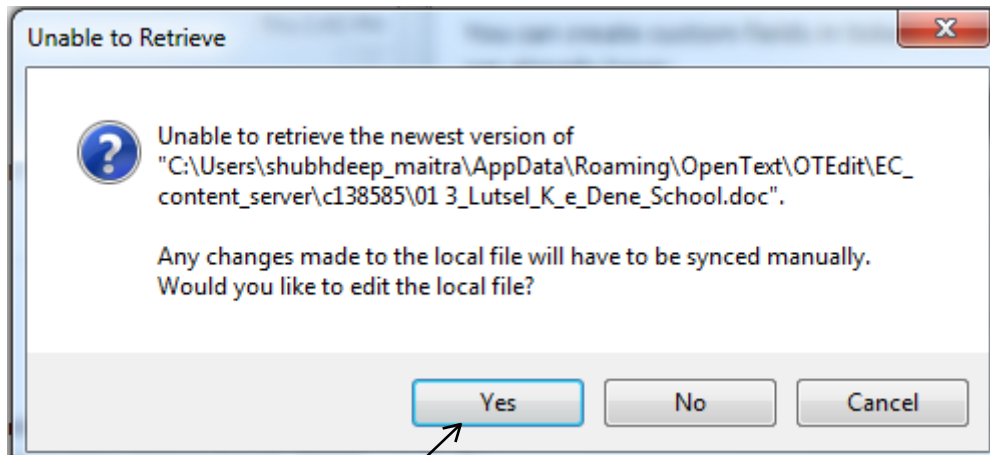

6. Once DIIMS is brought back online, you will see all of the standard items under the DIIMS node. DIIMS should automatically synchronize the offline versions into DIIMS. If you open the "***Manage Local Documents***", you will see the status of each document.
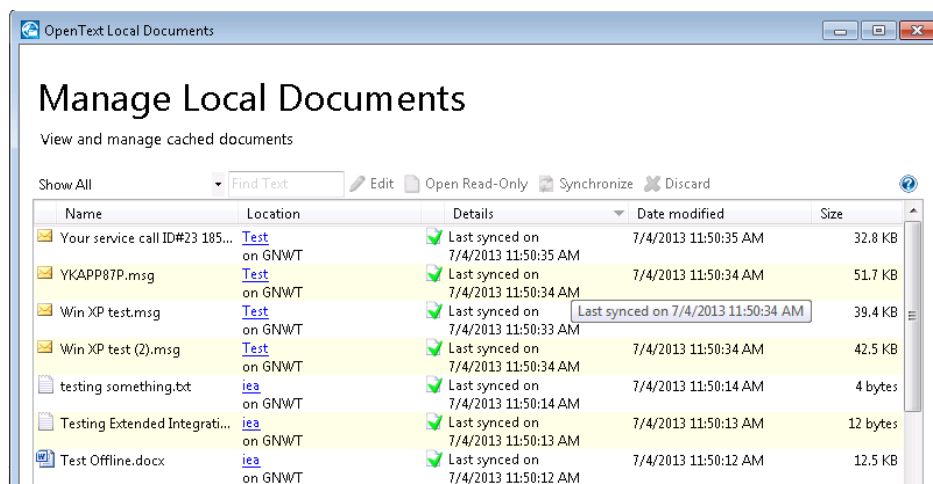
Error Messages and Resolution

Error Message

Reason: The original document is deleted / moved from its location

Solution: Click on the "**Yes**" button. Make changes to the document and hit the save button

Note: After switching DIIMS to online mode you may get the following error message. Open the document by doing a   right click on the DIIMS icon on desktop, go to "Offline" select "Manage local documents". Double click the needed document from the list **->** Go to the File Menu **->** Select **"Save *as* "** and choose a folder to save the document.
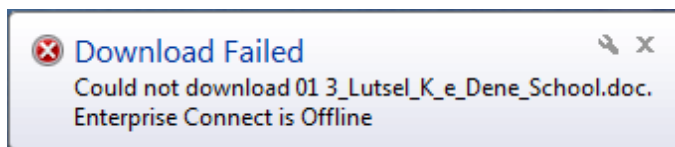
Working Offline Business Rules

When working with documents offline, the following behaviors apply:

- If you take a document offline and do not modify it, you will not be able to upload the document.

- If you try to upload a document that you have edited offline, you will be advised if a newer version of that document has been added to DIIMS. You will have the option of adding your offline version.

- If you try to upload a version of a document that you have edited offline, you will be notified if another user has reserved the source version of that document. Your offline version will be retained, and you can upload it after the other user has unreserved the document.

- If you reserve a document and then take it offline, the offline version that you upload is added as a new version.

- If you try to upload a document that you have edited offline, and the document has been deleted from DIIMS, you will be notified that the source document has been deleted. You will have the option of uploading the offline version as a new document.

- If you try to upload a document that you have edited offline, and you do not have permissions to edit the document, you will be warned that you have insufficient permissions. Your offline version will be retained.

- If you try to upload a new version of a document that you have edited offline, and the document has been deleted from DIIMS, you will be notified that the source document has been deleted. You will have the option of uploading the offline version as a new document.

Note: A document is not automatically reserved (checked out) when you take it offline.

DIIMS Help Desk Support

Contact Information
Email: DIIMS@gov.nt.ca
Telephone: 867-920-3078

The DIIMS Help Desk should be the first point of contact for any DIIMS related issues. The DIIMS team will do the initial diagnosis to determine if the issue is DIIMS related or determine if TSC involvement is required. A ticket will be created with the TSC on behalf of the employee if the TSC needs to be involved.

Your departmental records coordinator should be the first point of contact for any records management inquiries that you may have.

Examples of RM questions would be:
- Where do I save this document in DIIMS?
- I need a new file number created
- Can I delete these documents or folders?
- What are ARCS and ORCS?
- I need access to certain folders or documents

The DIIMS team is continually working with GNWT employees and with the vendor to improve the interaction with DIIMS. Please feel free to email any suggestions, feedback, or comments to the DIIMS Help Desk.

DIIMS Support Documentation

The training guide is available online, along with any other support documentation that has been developed. Please follow this link: http://diims.pws.gov.nt.ca/gnwt/llisapi.dll/open/11201325 to access the documents. We are continuously adding Tips & Tricks, along with bulletins and other informative information to this location.